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Facilitating Effective Change Management in The Charitable Giving Trust

A dissertation submitted in partial fulfilment of the requirements of the University of Chester for the degree of Master of Business Administration

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Abstract

Given the pace of change and the many aspects of managing change which organisations need to address, effective change management has become an increasingly business critical capability of organisations.

The collaborating organisation, The Charitable Giving Trust (TCGT) has embarked on a substantial Information Systems Project which will replace or radically improve all technology infrastructure and information systems used to deliver services to clients.

TCGT requires effective change management throughout the project and in addition, the development of organisational capability to manage emergent and contingent change to its systems and business model.

Understanding the potential impact of change on employee well-being is vital, as is helping individuals manage to accept and embrace change. The people within an organisation can be the key to successful change or the biggest obstacle to it.

Academic research in the field of change management process and change models was reviewed. The role of organisational leadership and culture on the organisational propensity and capability to change was investigated. The research sought to identify the best practice approaches to change management which can facilitate employee commitment to, involvement in and acceptance of change.

The areas of academic research informed the research conducted within TCGT. The research sought to identify TCGT current approach to managing change, in order to inform recommendations for improvement and for adoption of applicable best practice.

Declaration

This work is original and has not been submitted previously for any academic purpose. All secondary sources are acknowledged.

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1. Introduction

1.1 Background

The research for this dissertation was conducted within The Charitable Giving Trust (TCGT), which is an organisation originally established in 2000 to manage the charity payroll giving function of a major retail organisation.

In 2003, following the sale of that organisation The Charitable Giving Trust became an independent charitable trust organisation. The then Chief Executive implemented a strategy of growing the income base of the Trust which involved the provision of payroll giving services to numerous corporate clients as well as new products and services in the form of on-line giving and appeals management.

Significant IT developments were required to deliver the business strategy and provide the contracted services to clients. These developments were delivered in a non-integrated manner, which has resulted in an operational model which is complex and an unsuitable platform to take the organisation forward.

In late 2008 the Trust began to experience a loss of revenue from its investment activities due to the economic downturn's impact on interest rates. In 2009 the loss of investment revenue worsened as interest rates fell to zero and in addition the impact of the operational costs of delivering contracted service levels rose, which resulted in a significant reduction in reserves.

By late 2010 a new Chief Executive, Commercial Director and Finance Director had been appointed. The Board recognised the current business operation and supporting systems were both ineffective and a constraint on further growth. Business development was halted to create an opportunity to stabilise the business and to allow time to conduct a thorough review of both business strategy and operations.

During 2011 the Board approved the initial business case for a new commercial strategy and supporting IT investment. The commercial and IT plans have been developed to drive growth in profitable revenues and ensure the business operation delivers appropriate service levels to clients in a cost effective manner.

The implementation of the Trust's plans requires significant organisational, process and systems change and the Board recognise the importance of managing this change effectively in respect of both achieving the business benefits it requires and supporting employees throughout the period of change, from preparation through to post implementation.

The researcher is undertaking the role of project manager for The Charitable Giving Trust during the most impactful phases of change.

1.2 Research Question

The research will investigate change management best practice and the approach to change management which could be applicable to The Charitable Giving Trust. It will make recommendations on the development of an appropriate approach to change management for the organisation.

The research question is as follows:

Facilitating effective change management in The Charitable Giving Trust

The aims of the research are:

1.2.1. To understand contemporary thinking on Change Management Best Practice.

1.2.2. Investigate the applicability of Change Management Best Practice for the collaborating organisation, The Charitable Giving Trust.

1.2.3. Based on 1.2.2. make recommendations for the development of best practice in The Charitable Giving Trust.

1.3 Justification for the Research

Given the pace of change and the many aspects of managing change which organisations need to address, effective change management has become an increasingly business critical capability of organisations (Balogun & Hailey, 2008).

Understanding the potential impact of change on employee wellbeing is vital, as is helping individuals manage the stress of change whilst accepting and embracing changes required (Senior, 2002). Effective change management is inextricably linked with the extent to which employees adapt, accept and embrace change (Self, 2007).The people within an organisation can be the key to successful change or the biggest obstacle to it (Smith, 2005).

Academic research in the field of change management process and change models will be reviewed. The role of organisational leadership, environment and culture on the organisational propensity and capability to change will be investigated. The research will seek to identify the factors and approaches which facilitate employee commitment to, involvement in and acceptance of change.

TCGT requires effective change management throughout a period of technology driven change. In addition it needs to develop organisational capability to manage emergent and contingent change to its systems and business model (Burnes, 2004).

The areas of academic research identified will inform the recommendations made to TCGT in support of their change agenda.

1.4 Methodology

A phenomenological, interpretivist philosophy has been selected for this research due to the stated aims of the research, in respect of making recommendations which are applicable to the collaborating organisation, The Charitable Giving Trust. It is important to understand the beliefs, views and motivation of the key stakeholders within TCGT (Fisher, 2010) in order that relevant and credible recommendations can be made which could be accepted by key decision makers and implemented.

The researcher's ontological view is an interpretivist one, (Fisher, 2010) informed by experience as a senior manager in complex organisations. The researcher will be working for TCGT during the research project, and is therefore a participant in what is being researched. The axiological position of the researcher will inevitably be subjective in these circumstances (Saunders, Lewis & Thornhill, 2009). Business and management research lends itself to an interpretivist perspective due to the complexity of situation and the multiple individuals involved at a specific time. (Saunders et al)

The epistemology of this research will be interpretivist, focussing on the details in the specific situation at TCGT and the reality and motivating actions behind the details (Robson, 2002).

The research approach will be inductive (Jancowicz, 1995) as this fits with the philosophy of the research and the specific situation. The emphasis will be on gaining understanding of the stakeholders in order to make appropriate best practice change management recommendations, relevant to them and their organisation.

The research strategy will consist of qualitative research utilising a semi-structured interview and a questionnaire. The strategy will facilitate the inclusion of cross sectional stakeholders within TCGT and is appropriate for the research question defined.

1.5 Outline of the Chapters

1.5.1 Chapter One:

The research topic and background to the research are introduced and the research question and aims are described.

1.5.2 Chapter Two:

This chapter contains a critical review of literature relating to change management. It details the academic theory relevant to the research question and conceptualises where this piece of research fits with that theory. The factors which most influence the success or failure of change are discussed.

1.5.3 Chapter Three:

This chapter describes the methodology employed to answer the research question, explaining why the approach was selected. It further describes how the researcher developed and administered the research instruments to ensure validity and take into consideration the other research risks such as ethical issues.

1.5.4 Chapter Four:

The outputs of the research along with analysis and commentary on the key finding are presented.

1.5.5 Chapter Five:

This chapter draws together the previous chapters in this dissertation, analysing the findings and presenting the recommendations and implications of the research, in the context of the academic literature discussed in chapter two.

Finally recommendations are made on how TCGT can implement change management best practice effectively.

1.6 Definitions

The definition of change management used for this research is:

“Change management is the set of tools, processes, skills and principles for managing the people side of change to achieve the required outcomes of a change project or initiative”

Source: Prosci's definition of change management (2011)

URL : http://www.prosci.com/prosci_change_series.pdf -

1.7 Summary

This chapter introduces the background and justification of the research question and the research question and aims are defined. The methodology to be used is summarised and justified. The outline of the research and subsequent chapters are described.

This chapter establishes the basis of the dissertation and the research can proceed with a critical literature review of academic theory on relevant subjects.

2. Literature Review

2.1 Introduction

The literature review covers many aspects of the wide-ranging subject of change management; from methodologies for specifying the change to be achieved, approaches to managing change, leadership, cultural implications, employee engagement, through to the post change analysis stage resulting in organisational learning.

There is an extensive and growing body of literature relating to change management, reflecting the on-going relevance of the subject to researchers and business organisations alike (Andrews Cameron & Harris, 2008). The debate about the most effective ways of achieving successful business change and creating organisational capability to manage on going change continues (Eriksen, 2008). Whilst there is no agreement on the one best way to manage change, there is a consensus that the pace of change creates a pressing need for organisations to develop the capability to manage change effectively (Owen, 2009).

The literature review, which has been carried out using a wide range of text books and journals, ensures that the research is founded on appropriate theory and enables the development of a conceptual model applicable to the research question to facilitate that research question to be addressed.

2.2 Drivers of Change

Changes are inevitable and organisations and people face change at various times (Burnes, 2004). Change can be large, organic, revolutionary or evolutionary, sought after or resisted (Hayes, 2007). As well as the inevitability of change, organisations are experiencing change with increasing pace (Rock & Donde, 2008).

The drivers of change include external factors not normally under the control of managers, such as politics, legislation, economic climate, technology advances and consumer demands as well as competitor behaviour suggest Johnson & Scholes (2007) who argue that these external drivers can usefully be examined to identify their impact using PESTEL analysis.

An organisation's internal change drivers can be more difficult to recognise and diagnose but are typically more readily influenced by managers once identified (Ivancevich & Matteson, 2002). These can include the need to improve business processes, enhance quality of service or cut costs. In many cases technology based solutions need to be deployed to support the required improvements (Grundy, 1995).

Pettigrew and Whipp (1991) distinguish between three dimensions of strategic change. These dimensions are the WHAT, HOW and WHERE of change.

Pettigrew and Whipp (1991) identify the continuous interplay between the three change dimensions and argue that successful change is a result of the interaction between the content or what ; the process or how of change; and the organisational context or where of change. They suggest that the context an organisation is operating in is the major driver of change for an organisation and recommend a process of environmental assessment to continuously monitor the internal and external environment of the organisation.

As well as the growing complexity of the external and internal environment faced by organisations the pace of technology driven change has increased significantly since the first widespread deployment of IT systems in the 1980's (Carnall, 2003). Technology advances can rapidly impact the expectations of consumers and the service delivery model of organisations (Walker, Armenakis & Bernerth, 2007) and the change impact must be identified by organisations and understood and acted upon, in order to ensure operational effectiveness, competitiveness and customer satisfaction (Balogun & Hailey, 2008).

Given the pace of technology change organisations need to develop appropriate approaches to change management, embracing the best practice identified through research and organisational learning (Andrews, Cameron & Harris, 2008). Organisations must learn to deal with the turbulence in the business environment and anticipate constant change (Owen, 2009).

2.3 Approaches to Change Management

2.3.1 Planned Change

Planned change is consciously undertaken and specifically directed by an organisation and differs from change which is imposed upon an organisation or change which comes about by accident (Burnes, 2004). Planned change is sometime referred to as top down, rational, linear or episodic (Hayes, 2007). Bamford & Forrester (2003) assert that planned change conceptualises change as a process that moves an organisation from one fixed position to another, through a number of planned steps.

Lewin (1951) developed a 3 phase model for planned organisational change which shows the transition of an organisation from one fixed state to another, through a process of unfreezing the current organisational state, moving and finally refreezing.

The unfreezing stage is where organisations alter their way of thinking and become aware of the case for change. Lewin (1951) maintains that organisations need to abandon traditional behaviours before new ways of working can be accepted.

Moving is the process of making changes which achieve the new organisational form whilst the final step, refreezing, fixes and institutionalises the change.

Lewin (1951) saw planned change as an opportunity for learning based participative programs of change.

Lewin's model attracts a significant degree of criticism based on the degree of turbulence in the business environment and its impact on the ability to plan and execute the plan in a linear manner (Boyatzis, 2006). Additionally critics of Lewin's model cite the difficulty of ensuring all participants in the required change have the same common interest in making the change successful (Burnes, 2004) and the difficulties of achieving behavioural change (Bamford & Forrester, 2003).

Burnes, (2004) further criticises the planned approach and argues that change should be managed as a continuous process of responding to a changing environment with organisations developing the ability to change in a fundamental manner. Johnson &Scholes (2007) agree stating that incremental change is beneficial and manageable.

Despite the criticism Lewin's three step model continues to underpin models and theories of change. The terms mobilisation, move, sustain and institutionalise are now used (Balogun & Hailey, 2008) but the concepts of unfreezing, moving and refreezing are still important together with the compelling reason and vision for change which are necessary to create a climate in which the change is understood and supported by those impacted (Kotter & Schlesinger, 2008).

2.3.2 Emergent Change

An emergent approach to change is identified as a pertinent response to deal with a volatile environment (Bamford & Forrester, 2003). A volatile environment drives change and makes the process unpredictable (Burnes, 2004), who argues the context as well as the speed and depth of change required are all important factors in determining the right approach. Gradual change which can be achieved incrementally through improvisation and learning may be an appropriate response but other situations may require a more transformational change, and in some situations a combination of incremental and transformational change may be required (Dunphy Griffiths & Benn, 2007). It is possible to use small incremental change to build momentum and support for change as well as create change capability and positive culture change (Cole Harris & Bernerth, 2006).

The emergent response is often identified with continuous improvement approaches and organisational learning, such as Kaizen, Total Quality Management and Lean Six Sigma (Hayes, 2007). Burnes (2004) states that the emergent approach is a continuous, dynamic and contested process that emerges in an unpredictable and unplanned way, thereby contrasting with the planned approach. Burnes (2004) makes the case that transformational change can result from a continuous or incremental process of change.

Emergent change focuses on "bottom up" action rather than "top down" control (Walker et al, 2007). Due to the rapid pace of change senior management cannot plan and implement every action required for change, argue Bamford and Forrester (2003), who suggest senior managers should evolve their role from controller to facilitator.

Burnes (2004), emphasises that involvement of employees in identifying, developing and implementing the change is an important benefit of emergent change.

2.3.3 Contingent Change

Burnes (1996) describes the contingency theory of change which rejects the concept of one best approach, arguing that the change approach should be adopted through analysis of the environment in which the change is to be implemented. Burnes (2004), suggests a Framework for Change model which identifies the focus areas for change efforts based of the scale and pace of change required

Change is unpredictable and the approach needs to allow for unexpected impacts and revisions (Dawson, 2003). Chaos theory has been suggested by Fitzgerald (2002) as a way of understanding change on the basis that effective organisations operate at the edge of chaos. Fitzgerald (2002) argues that an understanding of the application of chaos theory will help managers cope with the challenge of profound change in the turbulent global marketplace.

Higgins (1995) identifies that western cultures favoured large change programs whereas Japanese firms favour continuous improvement. Higgins argues that the two approaches are not mutually exclusive and suggested a convergence of approaches. Organisations continually change in order to improve incrementally as part of the quality management process, whilst identifying more strategic or contingent approaches to change driven by major technology advances, competitors, customers or market opportunities (Oswick, Grant, Michelson & Wailes, 2005).

The integration of planned and emergent approaches to change, dependent on the analysis of the context an organisation is operating in, coupled with an approach which takes into account the pace of change is now the requirement for most organisations (Owen, 2009).

2.4 Leading and Managing Change

According to Pettigrew and Whipp (1991), the management of tasks are the What of change and require skills focused on people processes and resources and leadership is the How of change. They argue that leaders must create the culture, be a role model for the required behaviours, live the values, inspire, motivate and support people.

Kotterman (2006) states that defining leadership and management is difficult and that the terms are often used interchangeably, causing confusion. Kotterman (2006) describes management as the process of continual planning, organising, supervising and controlling resources to achieve organisational goals, asserting that managers are responsible for implementing and improving these processes, whereas leaders are looking into the future in anticipation of the organisation’s strategic direction and long-term future.

Bruch and Ghosal (2004) also define a distinction between managers, who are involved with the production of products or delivery of services, and leaders who are more concerned with the organisational environment and culture.

Mintzberg (2009) argues that whilst it is possible to distinguish leadership and management conceptually it is more difficult to do so in practice and, therefore, questions the value of the distinction.

Whilst it may be difficult to allocate the What and the How of Change (Pettigrew & Whipp, 1991) according to distinct managerial or leadership roles, there is a consensus that the successful management of change requires both effective leadership and management of the change process (Thornhill, Lewis Millmore & Saunders, 2000). Kotter (1996) developed an eight step process for managing change which emphasises the behavioural aspects of change, notably the role of leaders, role models and team work.

Cameron and Green (2005) and Carnall (2003) propose cyclical models with similarities to the Kotter model in that they include establishing the need for change, building capability, engagement, inclusion, rolling out and consolidation steps. Burnes (2004) identifies the commonality of exploration, planning, action and integration phases present in numerous change models.

2.5 Leadership and Culture

Hughs, Ginnett and Curphy (2009) stress the significance of the leadership role in effective change management.

Numerous aspects of change related expertise have been researched and developed which focus on the strategic, leadership and behavioural aspects of change (Burnes, 2004 and Balogun & Hailey, 2008).

Boyatzis and Akrivou (2006) focussed on the personal qualities of change leaders as drivers of intentional change and argue leaders must communicate clearly and consistently the need and urgency of change. Leaders' messages must create receptivity and readiness for change according to Armenikas and Harris (2002). More recently research by Frahm and Brown (2007) linked the use of appropriate change communication with change receptivity.

The behaviours and approaches to change adopted by leaders involved in successful organisation change were the subject of research by Longenecker and Rieman (2007, who assert that leaders must take responsibility for change and be sensitive to local needs and organisational culture.

Organisational culture will impact and be impacted by change argue Kotter and Cohen (2002). Change leaders must consider in all cases the culture and subcultures of their organisation and identify the internal and external drivers which should influence their approach to change (Drucker, 1999).

Kotter (1996) states that change requires a new or changed organisational culture, but recognises that culture is difficult to change. Kotter (1996) argues that results need to come first and become embedded into the organisation's way of doing things.

Schein (2004) identifies a strong connection between leadership and culture. He links the imposition of a leader's values and the resultant culture of an organisation and suggests that leadership and culture are two sides of the same coin. He suggests that culture in organisations is shaped by leadership behaviour and a set of structures, routines, rules and norms that guide and constrain behaviour.

According to Schein (2004), leaders must be aware of and decipher the culture of the organisation and groups within it but he believes that culture change itself is not a valid goal. Schein argues the change goals must be concrete in terms of resolving a specific problem in the organisation and concludes that new behaviours will only become embedded if they lead to success and satisfaction.

Dunphy et al. (2009), argue that culture gives meaning to members of groups. They state that a powerful way to create change is to confront, develop or remold cultural values, so that a profound change in understanding and purpose is experienced leading individuals to act differently going forward.

Leaders must maintain change and make it stick at a personal level, reinforce and support the desired behavior and performance of others and provide appropriate training and support to their colleagues at all levels argue Longenecker and Rieman (2007).

2.6 Resistance to Change

In 1998 Ansoff wrote about the need to identify and manage resistance to change whereas Pardo del Val and Fuentes (2003) identify résistance as a means of providing insight into overlooked aspects of the change approach. It is important to understand the deep rooted values of those impacted by change, the capabilities required to change, the different stakeholders' perspectives, the communication barriers, all of which are factors present in a complex change environment (Pardo del Val and Fuentes, 2003).

Eriksson (2004) identifies that organisation change programs often face serious problems with a large proportion of change programs failing or falling short of delivering the required outcomes. Elving (2005) suggests that organisational culture and the role of change agents and the timing of change initiatives, are factors influencing the resistance level and outcome of initiatives.

Resistance is often believed to be inevitable but it may be the result of the methods used to effect change, interpretation issues and miscommunication (Diefenbach, 2007). Resistance by employees is associated with a fear of the unknown, threat to personal power and influence and loss of security argue Kotter and Schlesinger (2008) who also identified that few managers systematically assess stakeholders who may resist a change initiative and find out why this is the case. They further recommend ensuring that any misunderstanding of the change and what it implies is avoided, with the positioning of clear messages of the reasons for change. Carnall (2003) argues that much of what is deemed to be resistance to change is in fact resistance to uncertainty.

Lack of resources to support the change program can become a resisting force if it results in a lack of progress and longer timescales (Self, 2007). Timescales are important and visible progress to those involved and impacted by change is important, argues Kotter (2001). Kotter suggests that evidencing progress is being made is vital, and assesses that without short term visible progress employees can become disengaged and give up their efforts to support the change. Lack of knowledge about the impact of change can cause fear for individuals and negatively affect their relationship with their employer (Parish Cadwallader & Busch, 2008).

Recognising the significance and critical need to manage resistance to change, Kotter and Schlesinger (1979) developed their 6 change approaches model for dealing with resistance to change. The 6 approaches are designed to address the different cause of resistance such as self-interest, misunderstanding, and low tolerance of change and different assessments of the situation.

Fronda and Moriceau 2008), argue that all resistance is not negative and in discussing and assessing it, improvements to the changes proposed can be identified leading to a more effective and workable outcome.

2.7 Stakeholder Management

Effective change management requires the change team to identify, prioritise and manage all stakeholders in the organisation in an appropriate way and external stakeholders also need to be identified and managed effectively (Kotter, 1996).

In addition to the identification and prioritisation of stakeholders it is important that the appropriate communication and relationship is established between the change project and the stakeholders (Clarkson, 1995).

By showing concern for stakeholders and treating them fairly, change managers are able to open up communication and create partnerships (Kotter & Cohen, 2002). Through a collaborative and balanced relationship, all stakeholders collectively help to improve the likelihood of a project success (Cameron & Green, 2005).

Balogun and Hailey (2008) argue that the change manager must have a combination of expertise comprising judgement and political skills, which will allow them to deal with internal political processes, influence decisions, deal with criticism, and manage their own reputation.

Middle management's role in dealing with what can be unexpected or emotional work and their position in the organisation which requires them to both manage frontline staff and deliver the objectives of senior managers is complex but pivotal to success (Eriksen, 2008). Organisational transformation will not be achieved without personal transformation of the change agents in organisations and change agents with high self-esteem and suitable support are more likely to bring about the required changes in themselves and in others (Eriksen, 2008).

2.8 Communicating the Case for Change

Managers need to make a clear and considered case for change based on the organisations business strategy, according to Kotter and Schlesinger (2008). Communication of the strategy and the drivers for change can help individuals appreciate the inevitability of change and understand that action is being taken to protect their future and that of the company, thereby addressing the fear or threat which individuals may associate with change, Burnes (2004).

According to Walker et al (2007) the impact of the pace of change means that organisations have to revisit their strategy and realign it to the situation the organisation faces, whilst Kotter and Schlesinger (2008) argue it is a mistake to approach change is a disjointed and incremental way without a clear and considered overall strategy.

Organisations face the challenge of providing confidence, reassurance and clarity of direction of the company whilst adjusting their strategic approach to respond to change (Collins, 2003). Effective communication of a consistent change message with a compelling case for change is required to achieve organisational readiness for change (Armenakis & Harris, 2001). Kotter (1996) argues that a common mistake is under communicating the vision by a factor of ten and perhaps up to 1000, and he suggests that constant communication is required with simple messages, creatively delivered.

Continuous communication and ensuring that employees understand the change goal will create change receptivity (Frahm and Brown, 2007) with the majority of communication being face to face dialogue and discourse. It is possible to reduce stress and anxiety about change through appropriate communication and the responsibility for communication should be spread throughout the organisation at all levels (Saka, 2003).

2.9 Employee Engagement

Employees are usually significant stakeholders in the change process and need to be engaged appropriately (Smith, 2005). Whilst communication may be all that is required for some employees, others may be directly affected by the change and require training and in some cases they may be required to identify the best approach to implementation and training (Parish Cadwallader & Busch, 2008).

Smith (2005) suggests that people are the main source and vehicle for change and advises of the need to ensure they are in a state of change readiness. Communicating the proposed changes and actively involving employees is likely to reduce initial resistance, promote employee satisfaction and meet their psychological and emotional needs (Parish et al, 2008).

Pasmore and Fagans (1992) identify the importance of employee participation and individual development through organisational change. The effects of change programs on employee emotions were studied by Eriksson (2004). Employee engagement and participation can be positively influenced by the training needs analysis process adopted in a change program, according to Reed and Vakola (2006)

It is more usual for managers to react negatively when employees voice concerns, or question change but their bottom up perspective on organisational change can be an important one (Bryant, 2006). According to Bryant managers should expect concerns to be raised, encourage feedback from employees and use such feedback to drive communication and participation.

2.10 Creating Organisational Change Capability

Burnes (2002) argues that at a time when effective leaders are at a premium and where continuous change is the order of the day organisations should align organisational change with management development strategically and operationally. Yukl (2002) argues that much of the skill essential for effective leadership is learned from experience rather than training programs but to be effective experience needs to be challenging, offer variety and provide quality feedback.

Burnes (2002) suggests that organisational change projects are challenging but can sometimes be regarded as too challenging for management development purposes, whilst Mullins (1999), cites action learning projects as a practical way of combining management development with organisational improvement. Burnes (2003) argues that organisations should develop a synergistic approach to change management and management development to enhance the effectiveness of both.

Burnes (2002) highlights the scale of failure of organisational change programs since the 1980's driven by the introduction of technology, Total Quality Management (TQM) and Business Process Reengineering (BPR). He argues that many high profile change efforts where significant resources and assistance was on offer had a high failure rate. Burnes examines the causes of failure and concludes that in all three cases failure of management or lack of management skills or behaviours were the cause.

The solution, Burnes (2002) argues, given that managers and organisations need to develop constantly to remain competitive is to explicitly align managing change with management development opportunities. Burnes (2002) concludes that the successful management of change whilst developing change capability within the organisation is both a strategic and operational goal which needs to be actively pursued.

2.11 Delivering IT Driven Change

The implementation stage of IT driven change projects is usually where the change becomes manifest and real and people seriously begin to question what is going to happen (Willcocks, Petheridge and Olson, 2005). Information systems entering the core of organisational processes can cause significant business change and people's response adjustment and learning becomes a crucial area of management concern (Willcocks et al, 2005). Systems which are installed are not the same as implemented systems and the system has to become institutionalised for the desired objectives to be achieved argue Kern, Lacity and Willcocks (2001).

The human and organisational cost of technical change can be 3 to 4 times the technical cost of implementation suggesting that behavioural and organisational change deserves sustained management effort. (Willcocks et al., 2005) IT has no inherent business value and management should assign much more importance to people factors than technical issues when implementing IT, according to Willcocks and Sauer (2001).

Specific organisational capability and enabling infrastructure are required to deliver the expected outcomes for stakeholders and this alignment can be difficult to achieve, especially where external influences are involved (Willcocks & Sauer, 2001). To be successful capability has to be delivered through appropriate business processes and used by people adopting culturally determined behaviours (Willcocks et al. 2005). The implementation process must take account of these factors so that the changes connected with the new IT system are introduced successfully into the social and political environment of the organisation (Willcocks et al. 2005).

Organisation members are often unwilling to change behaviours and this can impact the degree to which the new system is utilised as designed. (Willcocks & Sauer, 2001). It is crucial that the behavioural changes required to support the new system are identified and introduced from the outset of the project and the introduction of the changes required to successfully implement the new system should be seen as a process which needs careful planning and execution and not as a one off (Kern, Lacity and Willcocks, 2001).

2.12 Change in the Not for Profit Sector

Based on their work in over one hundred not for profit organisations, Stid and Baradach (2009) conclude that a significant number are well led but under managed. This situation argue Stid and Baradach can result in an ongoing climate of stress as if the organisation is operating is constant start-up mode, as the lack or experienced management creates a reactive rather than a proactive management approach to operations.

The reason for the under management of not for profits is, according to Stid and Baradach (2009), rooted in the tension between focusing the attraction and allocation of funds for the charitable work of the organisation and managing business efficiency.

Employees and volunteers in a not for profit organisation who are used to operating in an under managed organisation may not understand the case for change to a closer managed environment and culture, argue Stid and Baradach (2009).

According to Stid and Baradach (2009), managing change in a not for profit organisation may be particularly challenging as the managerial skills and resources will not necessarily be present in sufficient capacity or capability.

There has to be a clear message that effective management practices and systems are mainstream activities of the organisation, whilst recognising the passion and personal commitment that drives not for profit work argue Stid and Baradach (2009).

2.13 Monitoring and Reviewing Progress and Outcome

Assessing the impact and success of change is another aspect of change management, as it is important to understand if the anticipated changes and benefits have been achieved (Longenecker & Rieman, 2007). Szamosi and Duxbury (2002) developed a measure of organisational change and Edwards (2005) proposed an approach to the review of the transformation achieved by change projects. In addition Longenecker, Papp and Stansfield (2008) focus on post change analysis for the purpose of deriving organisational learning from change initiatives.

Models, toolkits and techniques have been developed to support effective change management (Cameron & Green, 2005), whilst IT project and software development methodologies such as Agile, PRINCE and MSP have emerged and been adopted in the IT industry (Hayes, 2007), to support the planning, monitoring and control of complex technology projects.

Change should also be assessed against the anticipated outcomes and benefits identified before the change project commences suggest Walker et al (2007).

2.14 The Conceptual Model

The research takes the theories and models reviewed earlier in Chapter 2 and uses relevant aspects of these to create a conceptual model shown as Figure 1. (Page 18)

The conceptual model represents the stages of change common to numerous models of planned change, namely exploration, planning, action and integration (Burnes, 2004). The model further reflects the continuous nature of change due to emerging drivers for change which require on-going adjustment to the business change agenda (Kotter, 1996).

The model shows the process of change surrounded by the ever present factors of pace and time which create pressure and challenge for organisations and those who lead and manage them (Rock & Donde, 2008).

The yellow arrows in the conceptual model represent the factors driving change that are present in the external and internal environment. In order to devise an appropriate change project or program of change it is necessary to understand the organisational context (Pettigrew & Whipp,1991 and Walker et al, 2007).

The research will seek to establish the extent to which these drivers for change have been identified and understood in TCGT.

The exploration stage of the change model is represented in the model in the box labelled (1). This stage of change is where the external and internal drivers create the organisational context for change (Pettigrew & Whipp, 1991). The role of leadership is to interpret the context for the organisation and create a compelling case for change which is meaningful for the stakeholders (Kotter,1996 and Hayes, 2007).

The research will assess the extent to which TCGT has identified a strong case for change and communicated this effectively to stakeholders.

These activities in the planning stage of the change model and are represented in the box labelled 2. The change approach together with the deliverables the change must achieve need to be identified and communicated effectively. These are the How and What of change in the conceptual model (Pettigrew & Whipp, 1991). The approach will also be influenced by the deliverables required to achieve the changes identified. The approach to employee engagement is also developed at this stage (Kotter,1996, Burnes, 2004, Balogun and Hailey, 2008, Parish et al., 2008, Bryant, 2006)

The research will assess the current approach to change in TCGT together with the extent of employee engagement undertaken to date.

The box labelled 3 represents the action stage of change. This stage focuses on management of the process of change, the deliverables to be achieved and the resources involved. In addition, leadership and management of all stakeholders, to influence the behaviours and actions of those who can have positive and negative impacts on the project (Kotter and Schlesinger, 2008, Burnes, 2004, Clarkson, 1995 and Bryant, 2006).

The research will assess the current change management capability and availability of resources to support the change project.

The box labelled 4 represents the integration stage of the change process and identifies the need to monitor the impact of change, review quality and effectiveness of the deliverables, embed the changes and consolidate learning to build capability in the organisation (Burnes, 2002, Kotter 1996, Longenecker et al, 2008, Cameron and Green, 2005 and Willcocks et al, 2005).

The arrows “further change” represents the drivers for further change which arise during the change process and which can improve the current change initiatives or inform additional ones. The conceptual model shows the further changes feeding into the organisational context and informing the case for change (Kotter,1996, Fronda & Moriceau, 2008, and Burnes, 2004).

The research will assess how TCGT currently manages business change.

The model has a box named “communication” which is present at all stages of the change process and flows between stages. This emphasises the extent to which communication is required to achieve effective change (Kotter, 1996, Bryant, 2006,and Smith, 2005).

The research will assess the current communication processes in TCGT in relation to change management.

The model also has a box named “Culture” which is present at all stages of the model. This emphasises the extent of the influence of organisational culture on the management and outcomes of change (Schein, 2004, Kotter, 1996 and Willcocks et al, 2005).

The research will assess the current culture within TCGT and identify implications for effective change management.

Finally the model has a series of arrows labelled “Change” which indicate the progress of change through the stages in the model into the integration stage, where further change is identified. This shows the requirement to manage a continuous process of change (Owen, 2009).

The conceptual model will inform the design of the semi-structured interviews and questionnaire which will be the used as the research instruments.

2.15 Summary

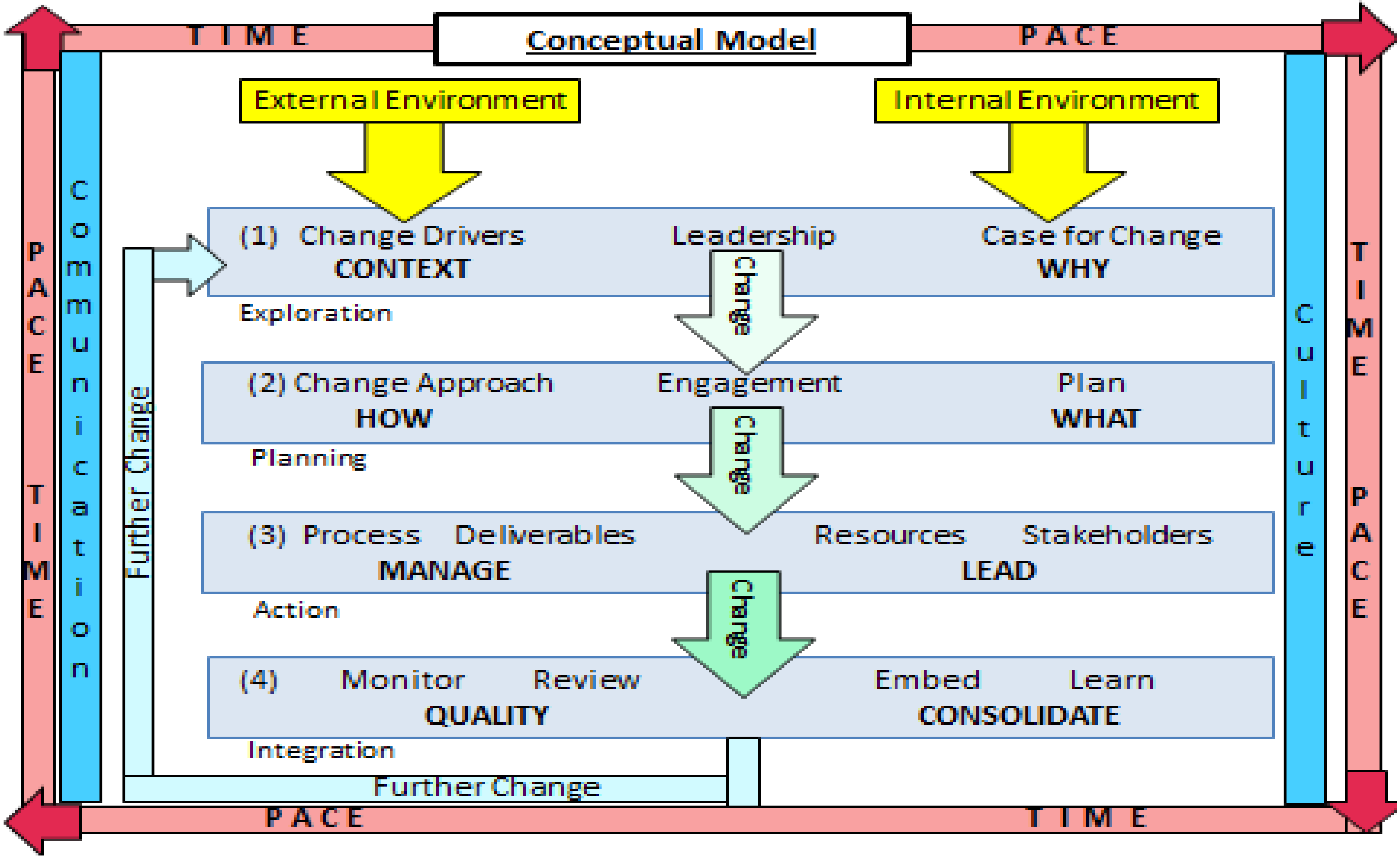
The relevant literature on change management that inform the research is outlined and discussed in Chapter 2.

The stages of change have been explored along with the behavioural aspects of change such as leadership, culture, employee engagement and resistance to change.

The concepts and theories examined have been used to create a conceptual model which will be used to design the research instruments which will in turn be used to answer the research question.

Chapter 3 discusses the research methods and instruments based on the conceptual model.

Figure 1: Conceptual Model (page 18 below)


Conceptual Model
TIME
PACE
External Environment
Internal Environment
(1) Change Drivers
CONTEXT
Leadership
Case for Change
WHY
Exploration
Change
(2) Change Approach
HOW
Engagement
Plan
WHAT
Planning
Change
(3) Process Deliverables
MANAGE
Resources Stakeholders
LEAD
Action
Change
(4) Monitor Review
QUALITY
Embed Learn
CONSOLIDATE
Integration
Further Change
Further Change
Communication
Culture
PACE TIME
TIME PACE
PACE
TIME

3. Methodology

3.1 Introduction

The methodology and philosophy used for the research will be discussed in this chapter. The chosen research strategy and the justification for the strategy for the research will be reviewed. The design of the research will be examined and related to the literature detailed in Chapter 2. The administration of the research will be reviewed and the ethical considerations will be examined.

3.2 Research Philosophy

A phenomenological approach, also known as, interpretivism or constructionism is the philosophy selected for the research. This approach is chosen as it takes into account that reality is influenced by the real world and the values of society. According to Fisher (2007) the intellectual tradition of phenomenology is rooted in the way we make sense of the world. Fisher defines two dimensions relating to the relationship between knowledge it is possible for an individual or society to have about the external world and the world itself. Fisher asserts that there is a spectrum which at one end is the idea that our knowledge is an exact reflection of the world and at the other end that the world is unknowable. Fisher argues that phenomenology falls between the two dimensions as it explores the processes groups and societies use to make sense of their world and because it is based on the premise that the real world is subject to interpretation by human thought.

Fisher (2010) and Easterby-Smith, Thorpe and Jackson (2008), argue that in the phenomenological approach reality is socially constructed and given meaning by people. The interpretative philosophy is a gnostic approach to research because it does not accept that an orthodox or standard interpretation of any specific topic exists (Fisher, 2010).The epistemology of the research will be interpretivist, focusing on the details in the specific situation in TCGT and the reality and motivating actions behind the details (Robson, 2002).

The selection of this approach is related to the axiology and experience of the researcher. Saunders, Lewis and Thornhill (2009) state that the axiology of an interpretivism philosophy is where the researcher is part of what is being researched and therefore cannot be separated and is thereby subjective. The researcher is an employee of TCGT and is therefore a participant in what is being researched. These circumstances result in the axiological position of the researcher inevitably being subjective. Saunders et al (2009), argue that researchers who adopt an interpretivist philosophy should adopt an empathetic approach when they enter the social world of their research subjects and understand their world view.

The researcher’s ontological view is an interpretivist one, informed by experience as a senior manager in complex organisations. Business and management research lends itself to an interpretivist perspective due to the complexity of the situation and the multiple individuals involved at a specific time (Saunders et al, 2009).

It is important to consider the beliefs, views and motivation of the key stakeholders in TCGT (Fisher, 2010), in order that credible and relevant recommendations can be made which could be accepted by key decision makers.

3.3 Research Strategy

The research strategy is developed to support the research aims which are concerned with the identification of applicable change management best practice for TCGT.

The researcher's previous experience of change management in previous senior management roles was taken into account as was the researcher's existing knowledge of the organisation and working relationships with the senior stakeholders in TCGT.

The selection of an interpretivist research philosophy was based on consideration of the research question and the context. The researcher identified a preference for the use of qualitative research to support an exploratory approach to the collection of qualitative data in order to achieve the research aims (Gill & Johnson, 2002).

Saunders et al (2009) and Fisher (2010), define the interpretivist approach as the epistemological position which advocates the necessity to understand differences between humans in their role as social actors. The researcher identified a preference for interpretivism for selecting an appropriate approach to change which will be implemented and experienced by a number of people, who each have their own perspective and meaning. Their interpretation of reality will be influenced by their own values and by other people's interpretations and the inevitable compromises that will be required (Fisher, 2010).

3.4 Justification for the Selected Paradigm and Methodology

The chosen approach is largely inductive due to the qualitative nature of the research being undertaken. The approach is appropriate for the exploratory nature of the research issue and is further justified by the researcher's philosophical preferences, value base and relevant experience. The interpretivist stance will enable the researcher to obtain different views and to take an empathetic approach (Easterby-Smith et al, 2008).

In order to select the research strategy a number of research methods were reviewed to determine which is most appropriate to answer the research question. The research strategy selected to answer the research question is a combination of semi-structured interview and a questionnaire.

Fisher (2010) states that semi-structured interviews provide the respondent with the opportunity to respond to questions in ways which seem appropriate to them. This was an important consideration in the selection of this method as the researcher felt that this would be an effective way of obtaining a range of qualitative data.

Researchers using semi-structured interviews require the ability to create rapport with participants to elicit the required information (Robson, 2002). The researcher is a close colleague of the intended interviewees and felt that rapport would be readily established.

The researcher selected a judgement sampling approach when selecting the colleagues to be interviewed. This approach is a type of purposive sampling which Sekeran (2003) defines as sampling which chooses subjects most advantageously placed to provide the information required. Fisher (2010) describes the approach as identifying the people who have the answers to the questions to ask. The researcher selected 6 Board members as interviewees based on this approach. Their roles in the organisation are described in 3.7.

The information elicited in the interviews will be used to answer the research question and will also inform the design of a questionnaire which all permanent staff will be invited to complete. The questionnaire will enable wider participation in the research which cannot be achieved through the semi-structured interview approach due to TCGT employee workload making them unavailable for interview (Cooper and Schindler, 2001).

Roll out of the questionnaire takes place following a small pilot involving three employees, which is intended to identify necessary modifications, prior to distribution instrument for the research (Fisher, 2010).

This research can be defined as a multi-method qualitative study (Maxwell, 2005). Central to the study is the research question and there is interaction between the research aims, the conceptual framework for the study, the research methods used and the validity of the data obtained. Maxwell argues that there must be a coherent and workable relationship between these components which the selected paradigm and methodology achieve.

3.5 Rejected Methods

The rejected research methods initially considered are detailed below with an explanation of why the researcher decided not to use them.

Unstructured interviews were rejected by the researcher due to the likelihood that they will not produce the information sought and because the range of information which might be produced from a series of unstructured interviews will not be the basis of comparison of the views of senior stakeholders. In addition the information required is to be used to inform the design of a questionnaire and it was felt that unstructured information would not assist in this regard.

Focus groups were rejected as the researcher believes that this would not result in all invitees contributing their view due to the personalities of the individuals concerned (Fisher, 2010). It was felt that some participants would be unwilling to volunteer their views in a group setting. Saunders et al (2009) argue that group interactions may lead to a highly productive discussion but caution that certain participants may dominate whilst others feel inhibited.

Another consideration was the challenge of availability of staff to attend focus groups due to the need to resource the day to day operational activities of the organisation, in particular manning the telephones in the customer service department. This would have led to an imbalance of attendees in the focus group with the client service roles being under represented.

3.6 Research Design

3.6.1 Design of Instruments

The researcher will undertake the research in her current employing organisation. The researcher is undertaking a fixed contract period of employment with TCGT and is performing a project management role in respect of the replacement of all Information System currently deployed.

The research aims are linked to the role currently being undertaken by the researcher and the resulting recommendations will inform the business readiness aspects of the IT systems replacement project currently in progress.

The Board of TCGT support the research and have agreed to their participation as interviewees and the participation of staff in completing the questionnaire.

The questions devised for the semi-structured interviews are based on the literature review and conceptual model detailed in Chapter 2. The questions are designed to help answer the research aims.

Appendix 1 details the questions used in the interviews and links those questions to the relevant components of the conceptual model from which the questions were developed. The information elicited in the interviews will be used to help the researcher develop the questionnaire. The interview questions and response sheets are attached as Appendix 3.

The semi-structured interview approach requires the interviewer to have a schedule of the main issues and topics to be covered and to start the discussion with open questions to gain the specific perspective of the interviewee (Fisher, 2010). Subsequently the interviewer should ask follow up questions to draw out additional information in respect of interesting points which arise. Easterby-Smith, Thorpe and Jackson (2008) suggest deviation from the sequencing of the prepared questions in order to follow interesting points which arise.

The questionnaire is developed based on the literature review and conceptual model detailed in Chapter 2 and taking into account relevant information obtained during the semi-structured interviews. The questionnaire is designed to help answer the research aims.

The questions included in the questionnaire are detailed in Appendix 2 and the questions are linked to the relevant components of the conceptual model on which the questions are largely based.

The questionnaire is piloted by 3 members of staff for the purpose of ensuring the questions are clear and the instructions for completion are easy to understand (Fisher, 2010). The questionnaire is modified following the pilot process, finalised and distributed to all staff. The design of the questionnaire consists of multiple choice questions with the opportunity to add comments (Fisher, 2010).

The final version of the questionnaire is attached as Appendix 4.

3.6.2 Validity and Reliability

The individuals selected for interview will be assured by the researcher in advance that their responses will be treated confidentially and not shared with other interviewees.

The researcher recognises that the nature of the working relationship between the researcher and the interviewees may lead the interviewees to give answers which do not reflect negatively on the organisation, which would affect the validity of their responses.

The questionnaire is circulated to all staff and it is clearly highlighted that they should complete it anonymously. They will be further assured that no data will be made available for use in the organisation and will only be used by the researcher to make recommendations for the development of a change management approach for TCGT.

The number of interviewees is 6 and the total number of staff the questionnaire will be circulated to is 30.These numbers represent all permanent staff and the 6 Board Members most closely involved in the Information Systems Project.

Easterby-Smith et al (2008) argue that a small number of participants when chosen for specific reasons is valid in qualitative research. Fisher (2010) advises that qualitative data generated by small samples must be subject to the judgment of the researcher when drawing out conclusions from the responses.

The researcher ensures careful consideration of the validity and reliability of the information produced from the interviews and questionnaires in the analysis and recommendations stages of the research.

Saunders et al (2009), state that the lack of standardisation in semi-structured interviews may lead to concerns in respect of reliability, in particular interviewer bias. The researcher is mindful of the degree of subjectivity that could influence the research throughout the interview and data analysis stages of the research.

3.7 Research Procedures

3.7.1 Semi-structured Interviews

Six semi-structured interviews were conducted over 3 days in September with the following people:

Chief Executive Officer
Commercial Director
Director of Finance
Operations Director
Non Exec Director1 -Financial Advisor
Non-Exec Director2 - Human Resources Advisor

The meetings were organised in advance and the purpose of the interview was explained beforehand.

The Chief Executive Officer (CEO) requested that no interview recordings take place and that no transcripts of interview notes be stored on servers within TCGT. The purpose of this was to give assurance to the interviewees that confidentiality would be preserved and to avoid any discomfort that may arise in the senior team from being recorded by an employee.

The interviews took place in a meeting room, which ensured that the conversation was not overheard. The meetings took approximately 1 hour to 1.5 hours each.

The researcher made notes for all interviews which were promptly written up following the interview on her personal laptop to comply with the CEO request. Saunders et al (2009) advise that a full record of the interview be made immediately after it has happened to help control bias and to ensure reliable data for later analysis.

All of the prepared questions were used in 5 of the interviews but 1 interview covered some of the questions in more depth and raised several additional points for discussion which resulted in the interview time being insufficient to complete all questions.

The interviewer found the structure useful in ensuring a flow of information could be maintained whilst the ability to explore additional points and give the interviewee the opportunity to convey their views and concerns produced interesting insights into the different stakeholder perspectives.

The interview responses were written up using the notes taken at the time. The typed notes were used to assist in the design of the questionnaire and the research findings.

3.7.2 Questionnaire

One member of staff from each of the three departments within TCGT was requested to review the questionnaire in order to pilot its use.

The aims of the research were explained to the pilot group along with the purpose of piloting the questionnaire.

They were asked to complete the questionnaire and feedback comments indicating any difficulties encountered in completing the questionnaire such as questions which were unclear or instructions which were not straightforward to follow. They were asked to record how long the questionnaire took to complete.

The researcher explained that the pilot questionnaire they completed would not be included in the analysis stage of the research and that they would be invited to complete the finalised questionnaire anonymously at a later stage.

The 3 completed pilot questionnaires and the feedback sheets were reviewed and adjustments made to some of the wording of the questions and instructions on the questionnaire (Fisher, 2010). The finalised questionnaire was reviewed by the CEO and its use approved on 3rd October.

The request for completion was distributed to all 30 permanent members of staff by the researcher on 5th October 2011 with a deadline for completion of 14th October 2011. Recipients were instructed to return the completed questionnaires to the researcher, in A4 envelopes provided to each of them, without any name or identifiers which would identify the individual. A reminder was sent out to all staff on 12th October. 22 questionnaires were returned by the deadline of 14th October.

The researcher and all staff members work in the same building and it was challenging to preserve anonymity. The researcher collected all completed questionnaires received by the deadline and took them off site. The review of the completed questionnaires took place at this point rather than at the point of receipt.

3.8 Ethical Considerations

The ethical considerations for this research process arise from the selected research philosophy, namely a phenomenological approach. This is due to the approach of the researcher being employed in the collaborating organisation. The researcher works closely with some members of staff and in particular the interviewees. It was important to ensure that individuals did not feel pressurised or coerced into taking part (Saunders et al, 2009).

The researcher was also aware of the need to ensure confidentiality of responses by interviewees and anonymity of responses from staff completing the questionnaire.

Privacy of the staff who participated was given consideration in both the completion of questionnaire stage and in the analysis stage. The purpose of the information and how it would be used was explained to all participants ensuring that they could give their informed consent (Fisher, 2010).

Fisher suggests that recording the location of participants means that the study cannot be anonymous. The questionnaire requested the completion of the employees department and length of service and given the small sample number this information could have led to the identification of individuals. The researcher dealt with this by not publishing any of the data produced from analysing the questionnaire responses, within the organisation.

Interviewees were given an explanation of the purpose of the interview and how their responses would be used. It was made clear that they need not answer any questions they did not wish to and could terminate the interview at any time. Having explained these points the interviewees were asked if they were happy to proceed (Fisher, 2010).

The name of the collaborating organisation has been changed throughout to preserve confidentiality.

3.9 Summary

This chapter provides an outline of the methodology and philosophy of the research and the research strategy is explained and justified. The design of the research is discussed, including the design instruments and the research procedures are described. Finally ethical considerations and responses to those posed by the research are explained. The findings from the research are presented in the next chapter.

4. Findings

4.1 Introduction

This chapter documents the finding from the semi-structured interviews and questionnaire research instruments which are detailed in Chapter 3.

Qualitative data from the semi-structured interviews is reviewed and reference is made, where appropriate, to the differing views and comments contributed by the interviewees.

The review of the interview data is structured around the four change stages identified in the conceptual model namely Exploration, Planning, Action and Integration.

Data from the questionnaire is presented in a series of charts to demonstrate areas of interest. Other areas of interest identified which are not suitable for presentation in a chart are discussed.

This chapter does not draw conclusions since this will be covered in chapter five.

4.2 Findings from the Semi-structured Interviews

4.2.1 Change Stage – Exploration

Referring to the conceptual model the exploration stage of change is where the drivers of change are identified, the case for change is developed and an aligned understanding of the case for change is achieved through effective leadership and communication.

The interview questions aligned to the exploration stage of the change process were designed to establish if the internal and external drivers for change are identified by the organisation, how this is done and the extent to which there is alignment of views on the key business goals, in the senior team.

The questions were also intended to identify the extent to which a case for change has already been identified and the steps taken to communicate it to staff were also explored.

The interviewees identified a number of external drivers for change which included the Governments agenda of increasing charitable giving, corporate clients Corporate Social Responsibility agenda (CSR), the growing use of social media and mobile devices for fundraising and the economic conditions which have resulted in sustained low interest rates for investors.

The CEO described the challenge of growing charitable giving amongst younger donors and the issue of retaining current regular givers in the difficult economic climate, due to job loss or squeezed incomes.

Internal drivers for change were readily identified by all interviewees but there were differences in emphasis according to the role in the organisation. The drivers identified included ensuring the organisation has a viable business model which can scale to facilitate growth, improving operational processes, streamline the processes involved in financial reconciliation of client funds, offer corporate clients better fundraising services and create the platform to help sell services effectively.

The non-executive interviewees were both conscious of the need to address the lack of systems investment in the past.

The interviewees were asked about the way in which the external environment is monitored to identify potential impact on the organisation. The commercial director explained that he has recently led a market review which then led to an examination of all the products and services offered to clients and the revenue models associated with those services. Board strategy days are held at least once a year to consider the direction of the organisation and the external factors are taken into account as part of that activity.

There is no current process for continuous monitoring of change drivers.

The interviewees were asked to identify their key business goals, for the purpose of determining if a compelling case for change had been identified and the extent of alignment of views on the business goals. Again there were some differences in views and emphasis based on role in the organisation.

The CEO focussed on introducing new ways of working, implementing a disciplined approach to selling and service delivery to create a viable and scalable business model. The Commercial Director emphasised the need to achieve a technology infrastructure to support product development and service delivery. The operations director focussed on improving service delivery and operational efficiency. The FD focussed on achieving budget targets and implementing specific systems for improved financial reconciliation and reporting.

All interviewees were clear that the IT project was closely linked to their business goals and used words such as “Critical and clear link” , “Fundamental to achieving goals”, “We will go into decline without it”.

The benefits expected included improvement in reputation, sustainability, quality of service improvements, staff development and performance monitoring, efficiency of business processes leading to the ability to scale and replicate service.

One of the benefits emphasised by most of the interviewees was that the integration of systems would give a single source of data which would provide multiple benefits to reporting and operations for all.

The final question relating to the exploration stage of the interview related to the extent to which employees were perceived to have understood the need for the IT project and what it would deliver.

The non-executive interviewees were not sure what the current level of understanding was as they are not involved in the organisation day to day but they were aware of the significance of their support for the project. The other interviewees felt there was a good understanding of the reasons why the project is necessary and cited numerous areas of understanding they were confident the employees have:

4.2.2 Change Stage – Planning

Referring to the conceptual model the planning stage is where the approach to change is determined, where the case for change developed in the exploration stage is used to engage the organisation to build support and to begin to address resistance to change. It is also the stage where what is going to be delivered is determined together with the delivery plan.

The CEO explained that TCGT had recently undergone a period of reorganisation which included a restructure of the teams and changes to roles and responsibilities. This had been personally managed by the CEO due to its scale and impact and because of her experience from a former role as a Human Resources Director. The changes were extensive and a planned a systematic approach was needed due to the uncertainty such activities create.

Other interviewees explained that small changes to business processes were undertaken by the department concerned and each had the opportunity to direct current system suppliers to make changes to systems.

The Operations Director described how the recent restructure had created an opportunity for joined up thinking on managing process and systems change but acknowledge that there was not yet a process in place.

Interviewees were asked about the communication to employees about the project which had already taken place. The CEO has delivered most of the key message directly in team meetings which take place once a month for all staff. The extent of the investment being made is a message which has been conveyed. In addition employees were all invited to air their views on the current systems in a small number of workshops run by the CEO.

Routine employee communications include a briefing from the CEO and an invitation to put any items on the agenda employees wish ahead of the session. There are also team meeting run by team leaders but they have not yet been a forum for discussing the project.

The Finance Director commented that she has been delivering the message that the project will be a lot of work but the prize will be worth the effort, to her staff, who are experiencing a lot of pressure of work due to the current systems.

The Operations Director commented that employee support for the project would be influenced by the extent to which fairness in decision making was demonstrated for example, in respect of any job role changes required and in access to opportunities for personal development.

The Commercial Director said his team would be looking for the systems to help sell services offered to clients.

The CEO stressed the need for visible progress of the project and to listen to staff by providing the opportunity for discussion not just briefings. The non-exec directors indicated that supporting the employees through the change the project would bring was a key responsibility.

The interviewees were asked about their role in supporting the project and the employees involved and impacted.

The CEO explained that the project was going to create significant change for all including the Executive Team. One of her responsibilities is to support them as individuals to undertake the responsibilities they have for the project's success. It is also vital to give confidence to the Board that the project will deliver the capability required, given the level of investment.

The FD was determined to support her team in a very hands on way to keep their morale up and to ensure that their detailed requirements are delivered. The Operations Director also expected to be closely involved supporting the implementation directly and to have a communication role.

There was clear agreement that communications is a key remit of the senior team and Board together with a desire to produce joined up messages for all to use in a consistent manner.

The evidence and expectation of resistance to change was discussed and there was agreement that no resistance had been identified as yet. However there was a view that news ways of working could be resisted as the level of workload monitoring that was anticipated might cause resentment amongst the employees.

The Operations Director commented that some staff had worked in the organisation a long time and may resist a more disciplined approach including process compliance.

There was a view that the organisation as a whole may struggle with growing pressure for more formal process and compliance approaches which accompany growth and a major change project.

4.2.3 Change Stage - Action

Referring to the conceptual model the action stage is where the change project requires the effective management of the process of change and the deliverables and where leadership is required for the project resources and the project stakeholders.
The interviewees were asked about resource availability and capability at present.

The CEO referred to the need for project management and business analysis skills together with relationship and stakeholder management and to the need for governance and discipline .At the same time she expressed the view that as a small organisation it would be necessary to multitask and to choose the right external resources and suppliers to assist with the challenge.

The availability of expertise amongst Board members was highlighted by the non-executives who were keen to offer assistance.

The FD highlighted relationship management and team work, especially multi-disciplinary team and also the need for system testing skills.

In terms of the gaps in capability existing in the organisation at present there was a consensus that project management and business analysis were gaps which need to be addressed quickly.

Some internal resources have already been earmarked for the project roles required and these are the reporting specialists, the operations manager and the IT Support technician.

The interviewees did express concerns about capability of some individuals particularly related to experience and attention to detail but for the most part the concerns relate to availability of resource.

The CEO pointed out that roles would be backfilled using resources earmarked for this purpose if required. There was a consistent view expressed that the organisation would seek to develop people through the roles on the project and by providing training and support where needed.

The interviewees were asked about the approach to stakeholder management.

The identification of stakeholders and active management to address positive and negative influences has not been overtly discussed or addressed by the interviewees as yet but the CEO had given thought to the Board members, whose confidence is critical and to current suppliers who need to continue to provide services until the new systems are deployed.

4.2.4 Change Stage – Integration

Referring to the conceptual model the integration stage is the stage which is focused on monitoring and reviewing the deliverables of change, embedding them into the organisation and learning from the experience of managing the process and using the new deliverables. The key areas of focus are quality and consolidation so that the benefits of change are realised.

The interviewees were asked about the current change management processes and experience of managing change in the planning stage related questions (4.2.2). The current approach to change is largely informal and does not include recognisable quality and compliance steps.
The interviewees were asked about the management of organisational learning currently in place.

No formal organisational learning approaches are currently adopted. The organisation has recently developed a set of values which have been adopted and will now start to help drive the personal development plans of employees as they are introduced in a more formal way following the recent restructure. Two management development consultants are currently developing and delivering programs for the Executive Team as requested by the CEO.

The Finance staff do follow professional training programs and other staff attend courses and seminars when required but this is on an ad hoc basis.

There is no collective learning and skill transfer approach at present and no Training Needs Analysis has been done as yet for the IT Systems Project.

4.2.5 Other Change Factors

The final questions for the interviewees focused on the elements of the conceptual model concerned with the implications of the strengths and weaknesses in the organisational culture and the demands caused by the pace of change today.

The CEO described some issues she is currently addressing. Some staff can behave in a confrontational way at times of stress and failed to consult as much as they should. The collective decision making processes adopted by the Executive team could be very time consuming and perhaps not conducive to the quick decisions that may be required for the project.

The lack of compliance with process and lack of ownership for issue resolution were felt to be issues which needed to be addressed generally and in support of the project.

In general it was felt that there were many good working relationships and that the size of the organisation and single location encouraged good communication and cooperation. A number of interviewees commented that the organisation has a number of people who are keen to learn and develop.

The impact of the pace of change was discussed and there was agreement that the change brought about by the IT systems project would not be the end of the changes the organisation would have to manage. There was an acceptance that a pipeline of systems investment would need to be identified and managed more formally and that this would require skill set and behavioural change. The FD commented that the Executive team needs a systematic approach to planning for the future for which they were collectively responsible.

The Operations Director expressed her view about the need for an ongoing change capability and supporting processes: “We need to create the clear message that the project is not the end of the change process. Only by managing change effectively will we flourish”

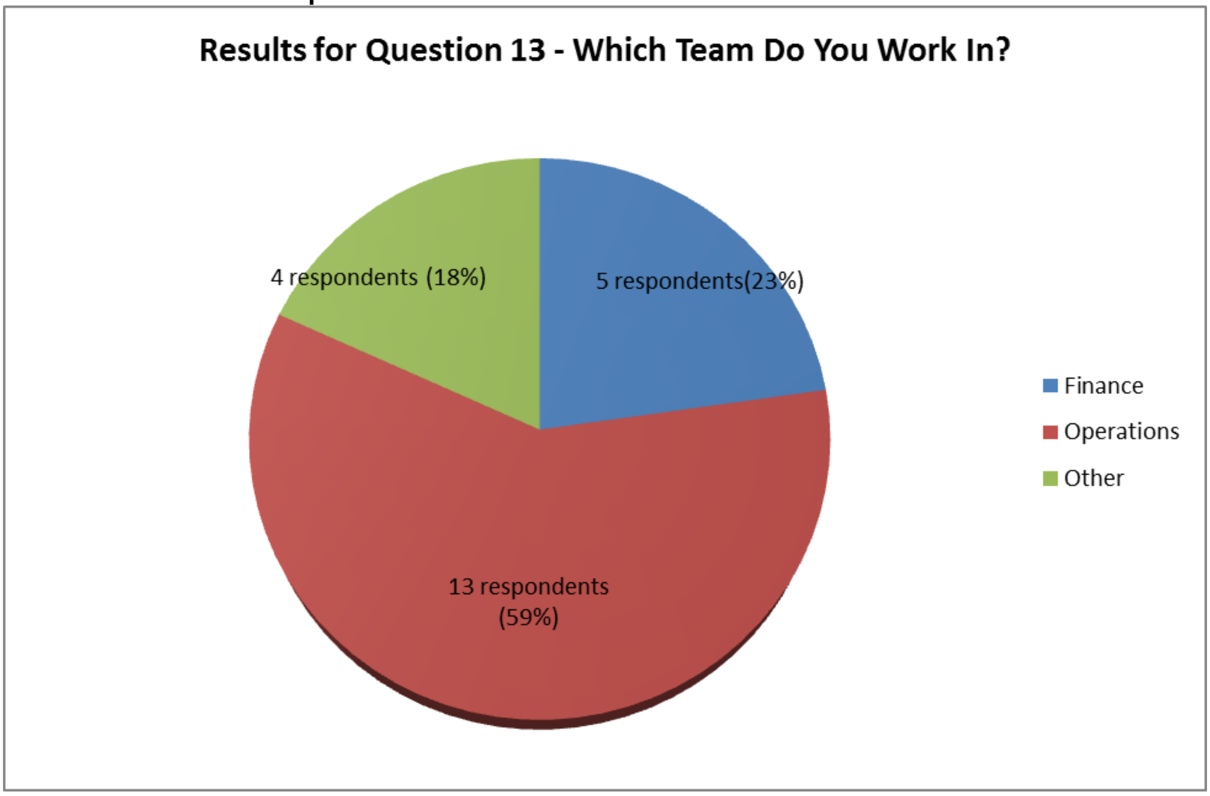
4.3 Findings from the Questionnaire

The response rate was 73%. The eight non-responders included members of each of the three teams with 5 of them being members of the operations team, which has 18 members of staff and is the biggest team. The response rate of 72% for this team is close to the overall response rate. Therefore, there is nothing to suggest that the 22 responders are not representative of all permanent staff. The research proceeded on the basis that it is a representative piece of research.

4.3.1 General Questions Analysed

Chart 1 below illustrates that 13 (59%) of respondents work in the Operations Team, 5 (23%) work in the Finance Team and 4 (18%) work in the “Other” team which comprises the Commercial Team and Executive Support.

Chart 1: Which team respondents work in

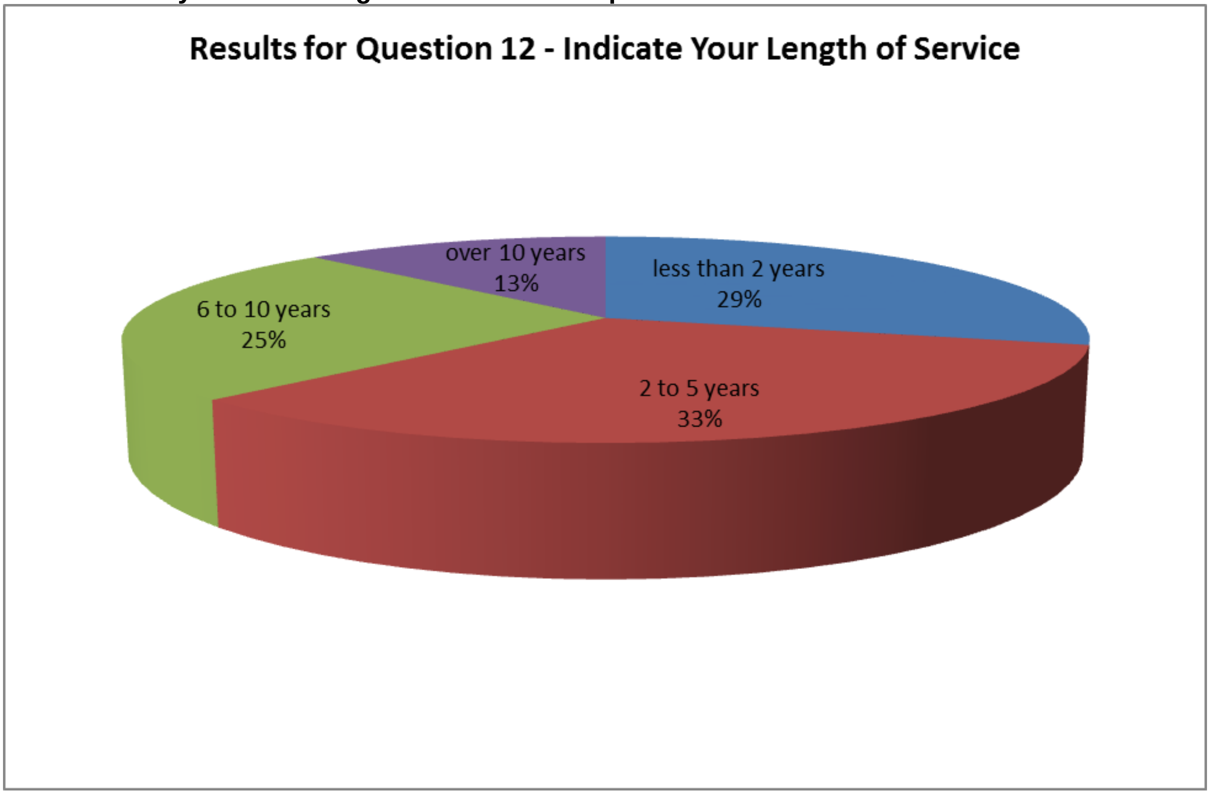


Source: Information Systems Questionnaire (October 2011)

Chart 2 shows the respondents length of service in one of four categories. Under 2 years, 2 to 5 years, 6 to 10 years and over 10 years.

Seven respondent (29%) have a length of service of less than 2 years; eight (33%) have a length of service of 2 to 5 years; six (25%) have a length of service of 6 to 10 years and three (13%) have a length of service of over 10 years.

Chart 2: Analysis of the length of service of respondents.



Source: Information Systems Questionnaire (October 2011)

4.3.2 Communications and Case for Change Questions Analysed

4.3.2.1 Question 1: What do you think the most important reasons are for undertaking the Information Systems Project?

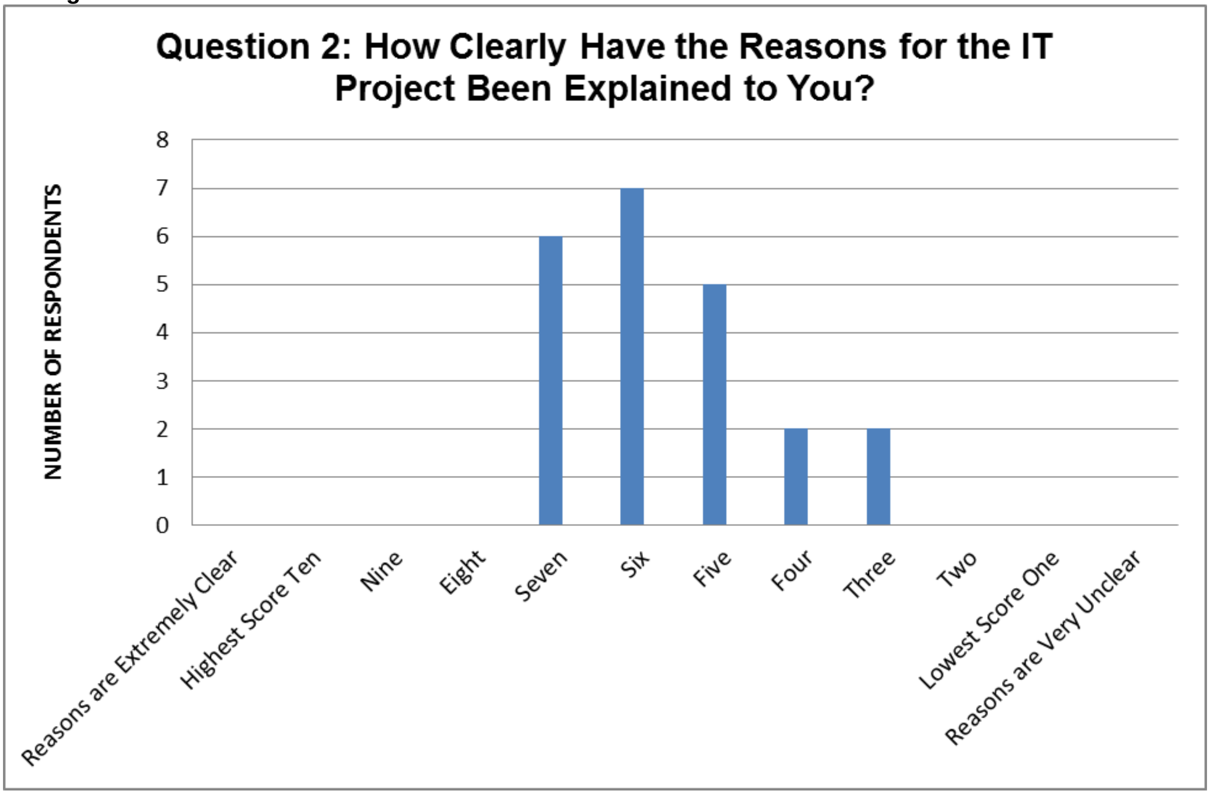
Respondents were asked to identify their top 3 reasons for undertaking the project. All were able to identify at least 3 and several were mentioned a number of times:

Reporting improvements, reduced manual processes, easier access to information, more reliable internet service, and better services for clients.

4.3.2.2 Question 2: How clearly have the reasons for the IT systems changes been explained to you by your manager or the executive team?

Chart 3 gives the respondents rating to the question:

Chart 3: How clearly have the reasons for the IT systems changes been explained to you by your manager or the executive team?

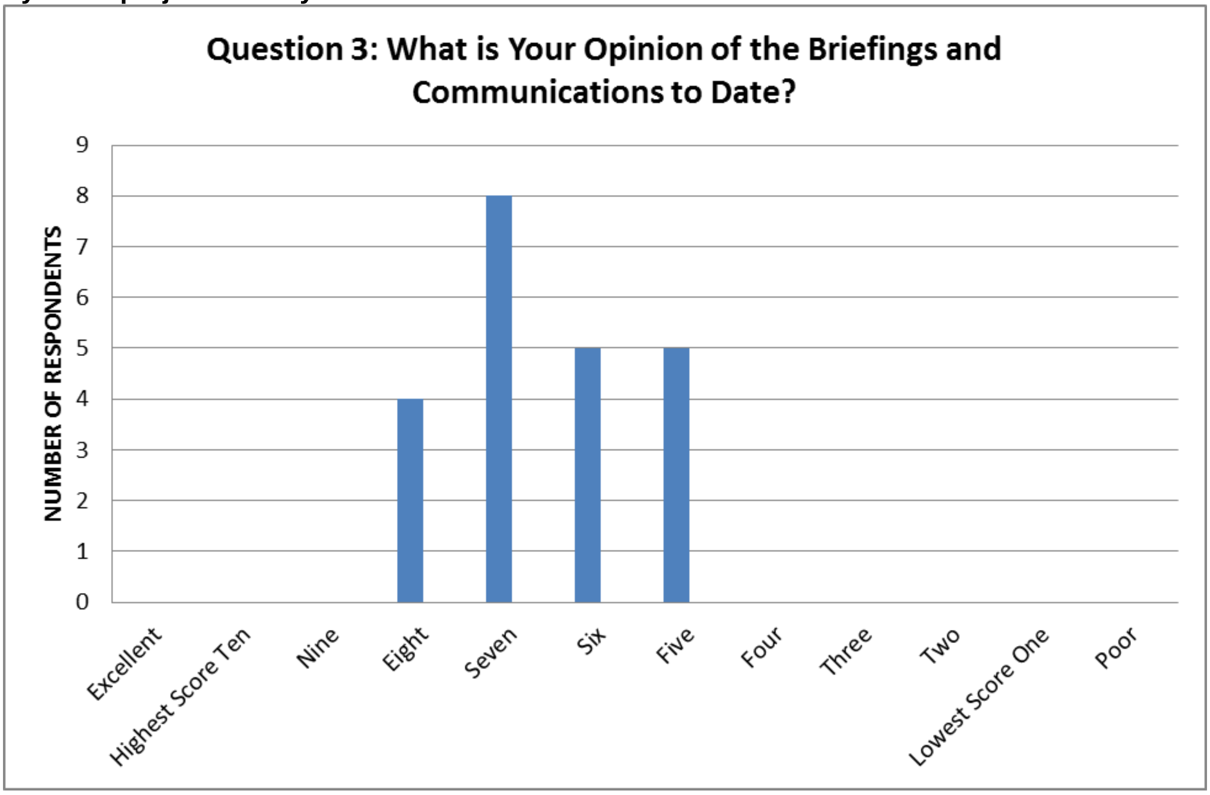


Source: Information Systems Questionnaire (October 2011)

4.3.2.3 Question 3: What is your opinion of the briefings and communications about the Information Systems project which you have attended / received to date?

Chart 4 gives the respondents ratings to the question:

Chart 4: What is your opinion of the briefings and communications about the Information Systems project which you have attended / received to date?



Source: Information Systems Questionnaire (October 2011)

4.3.2.4 Question 4: Do you have any suggestions for improvements in communication about the project which you would welcome at this stage?

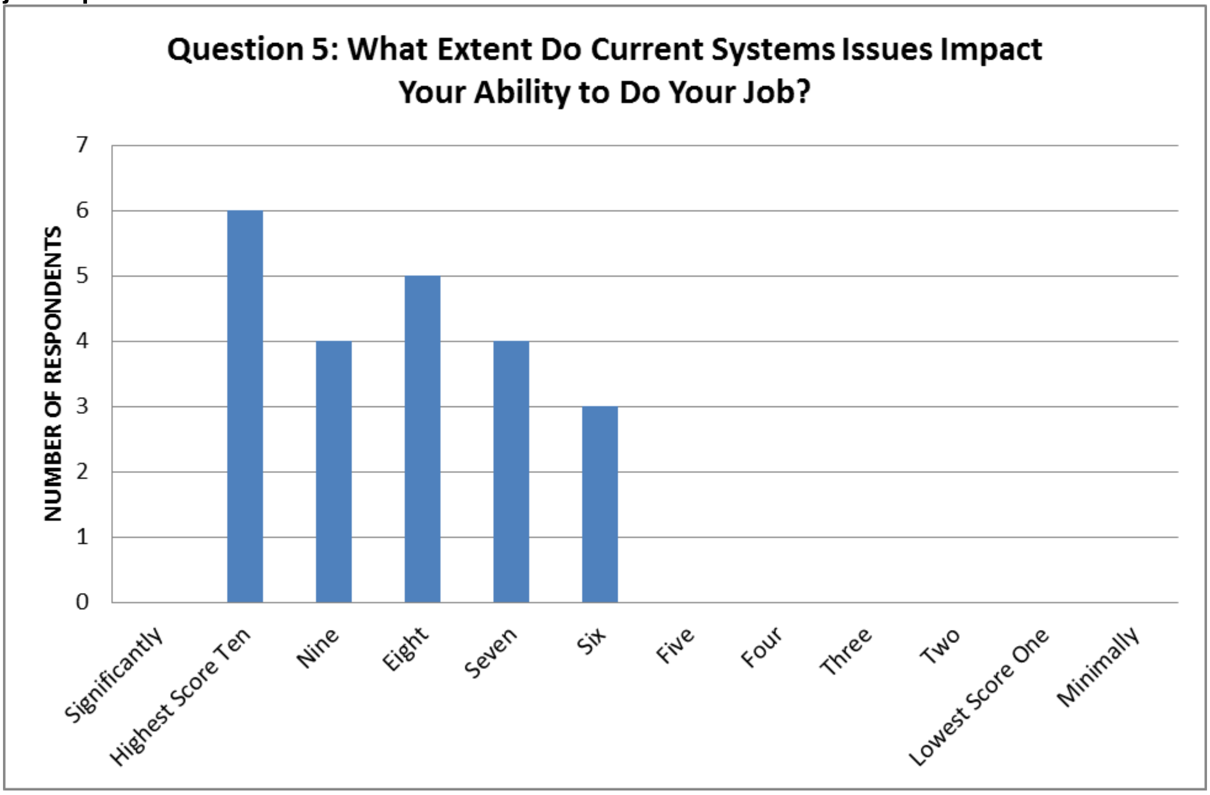
Respondents were asked to identify their top 3 suggestions for improving communications. All were able to identify at least 3 and several were mentioned a number of times:

These included more information on a regular basis, the opportunity to see the new systems during development, understanding the timescales of what would be delivered when, information about how the new systems would affect them.

4.3.2.5 Question 5: To what extent do current systems issues negatively impact your ability to do your job at present?

Chart 5 gives the respondents rating to the question:

Chart 5: To what extent do current systems issues negatively impact your ability to do your job at present?

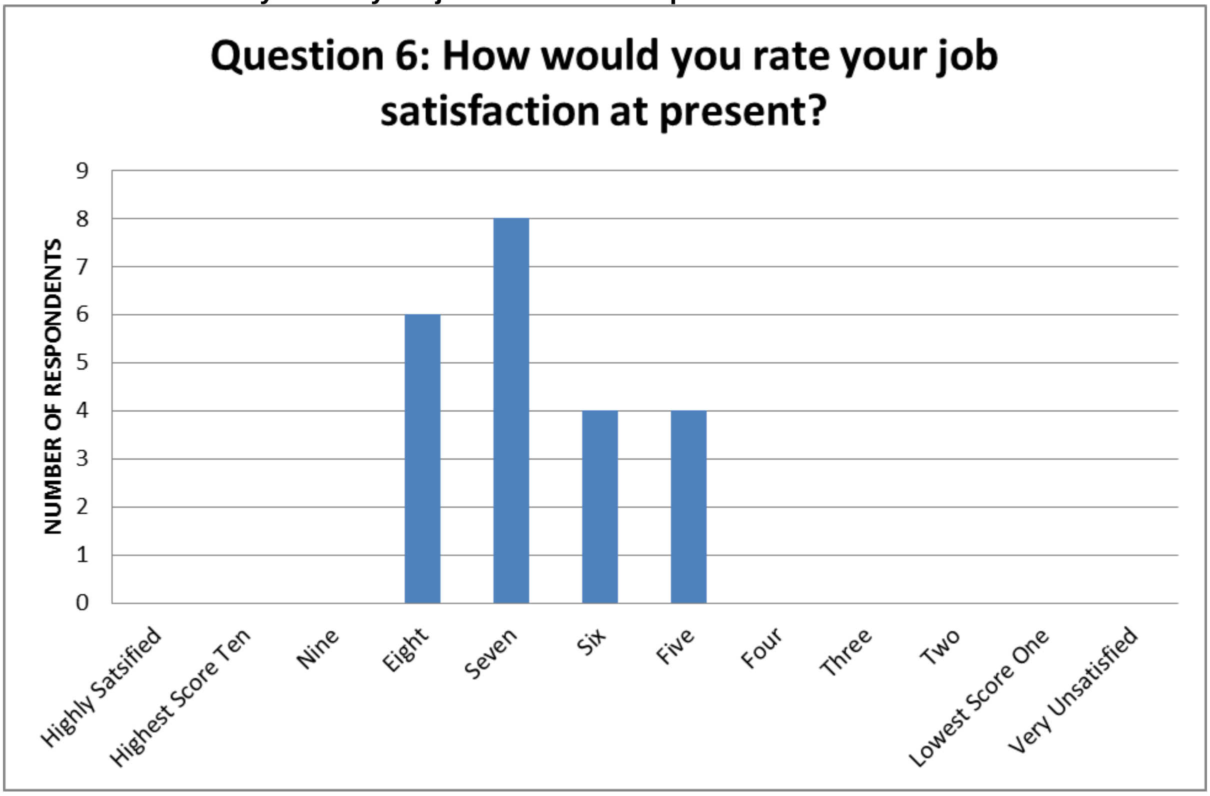


Source: Information Systems Questionnaire (October 2011)

4.3.2.6 Question 6: How would you rate your job satisfaction at present?

Chart 6 gives the respondents ratings to the question:

Chart 6: How would you rate your job satisfaction at present?



Source: Information Systems Questionnaire (October 2011)

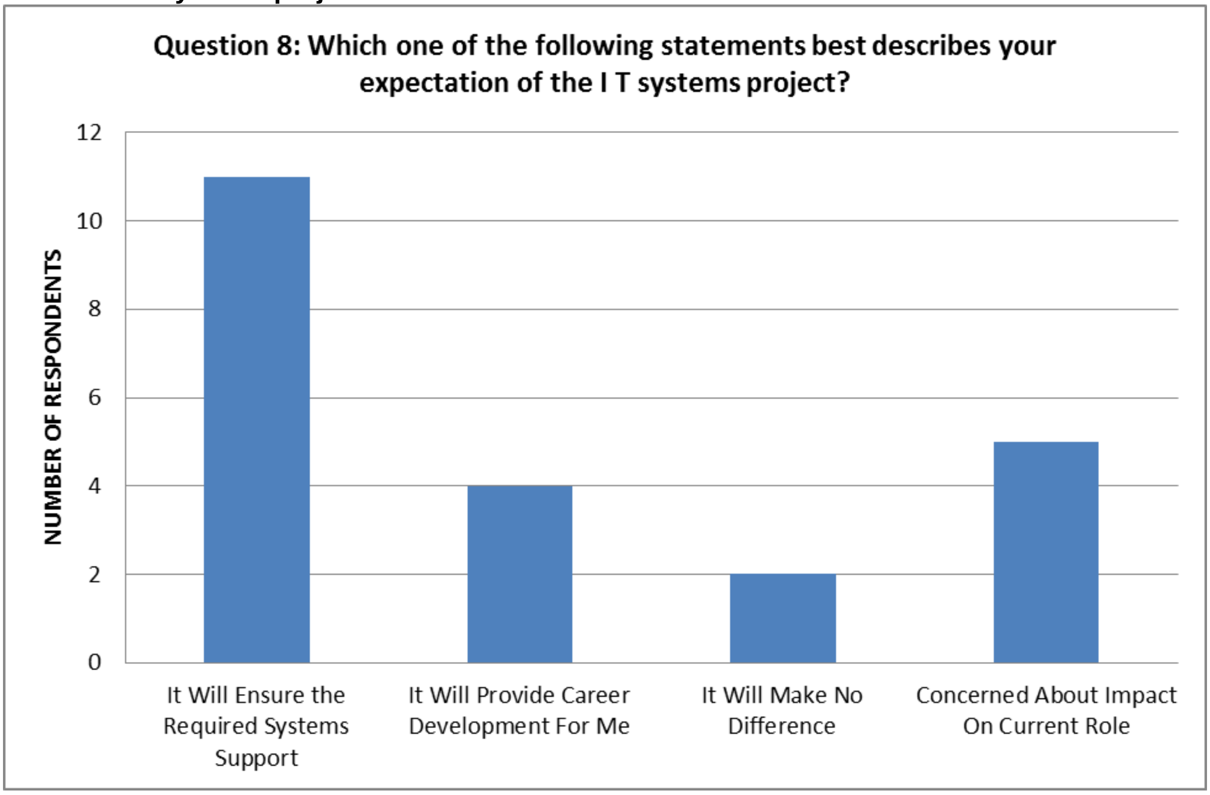
4.3.2.7 Question 7: What systems improvements would most help you to do your job better and improve your job satisfaction?

The respondents were asked to indicate their top 3 system improvements. All were able to identify at least three. These included a reporting system, easier data imports of client data, better search facilities, enhanced web platform for clients and charities, all services managed on one system

4.3.2.8 Question 8: Which one of the following statements best describes your expectation of the Information Systems project?

Chart 7 gives the respondents rating to the question:

Chart 7: Which one of the following statements best describes your expectation of the Information Systems project?

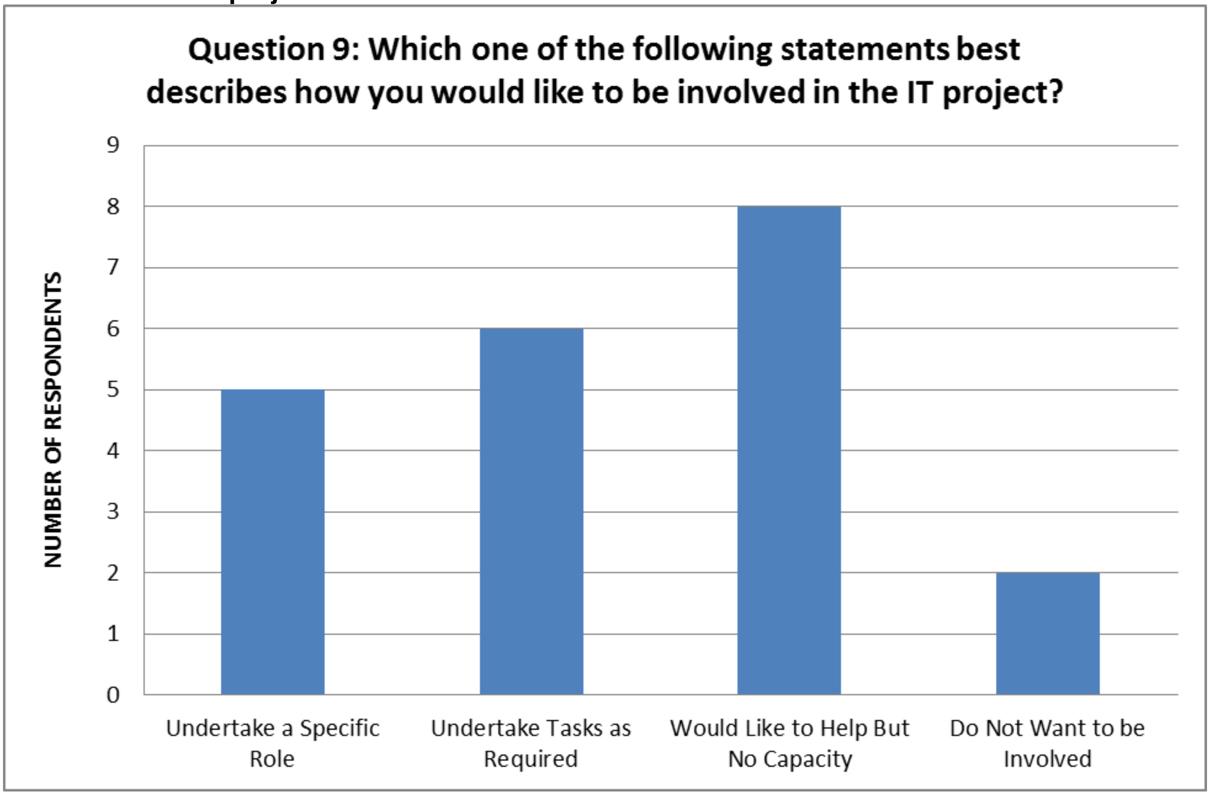


Source: Information Systems Questionnaire (October 2011)

4.3.2.9 Question 9: Which one of the following statements best describes how you would like to be involved in the IT project?

Chart 8 gives the respondents ratings of the question:

Chart 8: Which one of the following statements best describes how you would like to be involved in the IT project?

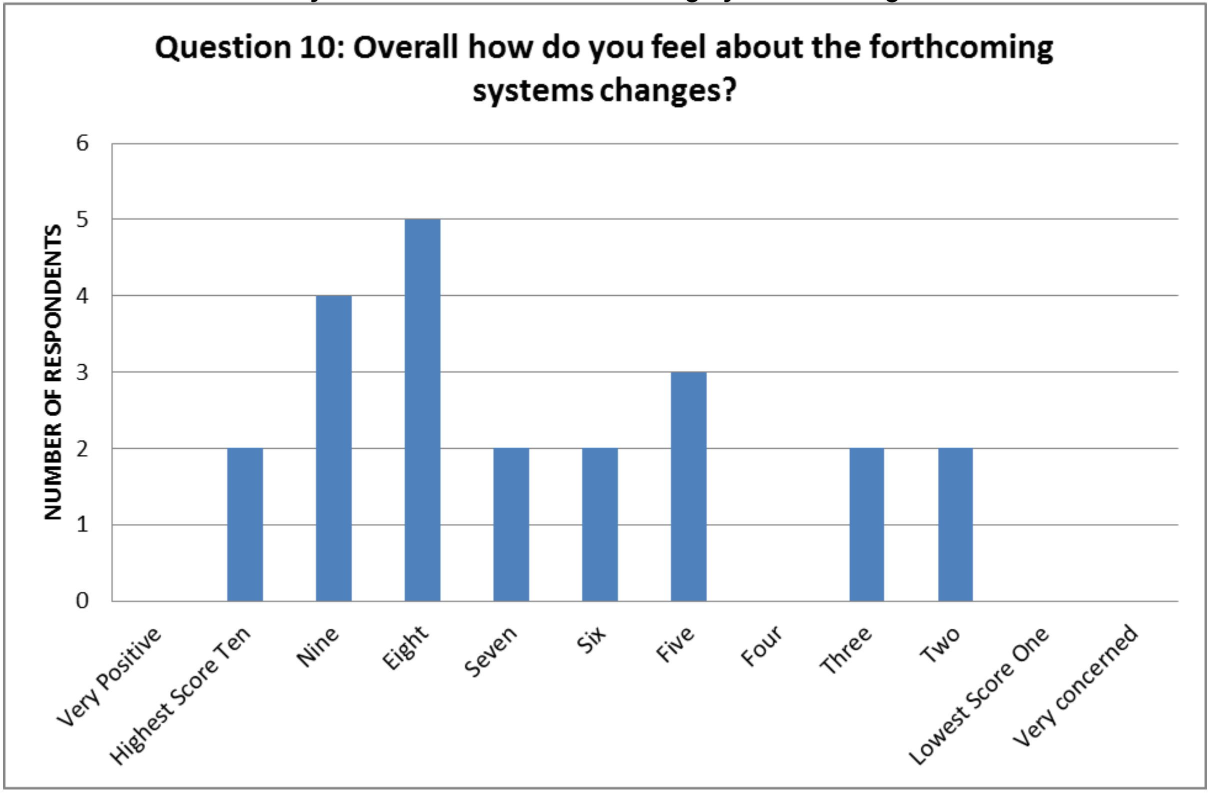


Source: Information Systems Questionnaire (October 2011)

4.4.2.10 Question 10: Overall how do you feel about the forthcoming systems changes?

Chart 9 gives the respondents ratings to the question:

Chart 9: Overall how do you feel about the forthcoming systems changes?



Source: Information Systems Questionnaire (October 2011)

There is a wide range of responses to this question with most staff indicating a score of seven or over (69%) and the remaining staff (31%) indicating a score of 6 or less.

4.4 Summary

In this chapter the findings from the semi-structured interviews were presented and the data collected in the questionnaire were presented utilising histograms and pie charts. The analysis of the findings in the context of the literature review and conceptual model presented in Chapter 2 will be further explored in Chapter 5.

5. Answers to the Research Questions and Recommendations

5.1 Introduction

The fifth chapter will further explore the analysis of the data from the semi-structured interviews and questionnaire presented in Chapter 4 in the context of the literature review and Conceptual Model developed in Chapter 2. This chapter will critically evaluate the methodology used for the research, prior to addressing the research question and aims and making recommendations. Finally the chapter assesses the limitations of the research and identifies opportunities for further research.

5.2 Critical Evaluation of Adopted Method

When selecting interviewees for the semi-structured interview, the researcher used judgement sampling, on the basis that this will select the subjects most advantageously placed to provide the information required. The researcher selected six Board members as interviewees, based on this approach. All of the interviewees are involved in the IT Systems Project and have a vested interest in its success and the majority have a defined role on the project Steering Group. However, the non-executive directors are not closely involved in the business operation and were unable to provide the detailed responses the researcher expected to a number of the interview questions. It is likely that team leaders would have offered more detailed answers to some of the interview questions and the research may have been improved by their detailed contribution.

The researcher is employed by TCGT as the IT systems project manager. The Executive Team and non-executive directors are important stakeholders for the project manager. It is possible that the researcher was inhibited from asking sufficiently probing questions based on the need to maintain close working relationships with colleagues and stakeholders. The researcher’s approach to minimise the likelihood of reduced scrutiny or criticism was to focus on the components in the conceptual model to frame the questions used in the interview and questionnaire and not on personal knowledge and experience of the organisation and its employees.

The framework provided by the semi structured interview approach was useful in ensuring the same questions were asked of each interviewee, which removed the possibility of making assumptions based on prior knowledge and in helping the researcher avoid the possibility of the interview becoming a meeting between colleagues or a dialogue with key stakeholders.

The researcher is aware of the possibility that in analysing the responses to interview questions there may be a risk that the analysis would focus on the positive in order to reflect a favourable impression of the interviewee, given the relationships need to be positive through the project.

The researcher requested permission from the CEO to make a recording of the interviews but this was rejected as it was felt it was inappropriate for an employee to record the senior team and non-executive directors and that this would inhibit the responses given. It was important, therefore, to make detailed notes and to complete prompt transcripts. Taking notes of sufficient detail is challenging when also listening and responding to the interviewee, in order to probe and ask follow up questions. It is possible the interviews would have produced enhanced information if they had been recorded.

The interviews drew out the relevant views and knowledge of the interviewees and identified the different perspectives they had on the project in terms of drivers, objectives and benefits and also identified points of alignment. The working relationship with the researcher allowed rapport to be established readily and answers to the questions posed were given with a notable level of trust and confidence.

Overall the semi-structured interview worked satisfactorily in producing data to inform the analysis and recommendations.

The questionnaire was distributed by the researcher in person to all 30 permanent members of staff, which is possible due to the size and the single site operation of the organisation. The completion rate was 73% which the researcher regarded as lower than anticipated, however, Fisher (2007) asserts that a questionnaire distributed to employees in an organisation should attract a return rate of 70% so the return rate is in line with this. Each of the 3 teams in the organisation returned questionnaires so the researcher was satisfied that all areas were represented.

Anonymity was difficult to preserve due to the small number of people in TCGT, which meant that comments on the questionnaire could point to individuals the researcher works closely with. The researcher did not divulge the comments on the questionnaire within TCGT to preserve anonymity.

Although the questionnaire was piloted by 3 members of staff and modified before distribution to all staff, the analysis of the research data revealed that in two of the questions no opportunity for comment had been provided. In both cases the options selected by respondents created points of interest for the researcher and the absence of related comments inhibited better understanding. Several opportunities to comment were provided on the questionnaire, many of which were utilised so the impact of this issue is likely to be limited.

Some of the questions required interviewees to identify three key items of their own choice to answer the question. Whilst the answers produced a range of responses, which made the analysis more time consuming, it did produce a good deal of commonality of key items and issues which can be used to inform the recommendations. This approach would not be suitable if the number of respondents was larger. All the respondents completed all questions except the last question requesting final comments, and many of the responses were accompanied by comments which added depth to the analysis.

5.3 The Answer to the Research Question

The research question was: “Facilitating effective change management in The Charitable Giving Trust”. This section provides the answer to the question.

The first aim of the research is “To understand contemporary thinking on change management best practice.”

Chapter 2 provides a detailed review of contemporary thinking and facilitated the development of a conceptual framework for use in this dissertation, thereby satisfying the first aim. The framework is utilised to contextualise the findings of the research and answer the research question.

The second aim of the research is “To investigate the applicability of change management best practice for the collaborating organisation, The Charitable Giving Trust”

Figure 2 below (page 45) shows the conceptual model components identified through understanding contemporary thinking on change management best practice.

The semi-structured interviews and questionnaire were designed to determine the extent to which the activities and processes identified as change management best practice are currently undertaken in TCGT and to what extent they have been successful, if used.

The applicability of the identified change management best practice to TCGT is discussed in this section (5.3) and informs the recommendations made in section 5.4 in relation to how TCGT can develop a change management approach applicable to their organisation, circumstances and the type of change required (Burnes, 2004).

Figure 2:		Change Management Best Practice	
Change Stage	**Conceptual Model Component**	**Literature**	**Model**
Exploration	Change Drivers / CONTEXT	Johnson et al(2007), Pettigrew and Whipp(1991)(1991), Ivancevich and Matteson(2002), Walker et al(2007)	PESTEL, Pettigrew and Whipp(1991) WHAT HOW WHERE,
	Leadership	Kotter(1996), Hayes(2007), Yukl(2002), Walker et al(2007), Balogun and Hailey (2008)	Kotter(1996) 8 Steps Process,
	Case for Change/WHY	Kotter(1996), Burnes(2004))	8 steps, Burnes(2004) Framework for Change
Planning	Change Approach/HOW	Lewin(1951), Kotter(1996), Burnes(2004), Pettigrew and Whipp(1991), Pasmore and Fagans(1992), Parish et al(2008), Bryant(2006)	Lewin(1951) Three Phase , Framework for Change
	Engagement	Kotter(1996), Burnes(2004), Balogun and Hailey (2008)	8 steps, Framework for change
	Plan/WHAT	Lewin(1951), Burnes(2004), Pettigrew and Whipp(1991), Kotter(1996)	Lewin(1951) Three Phase , Framework for Change, 8 steps
Action	MANAGE- Process and Deliverables	Lewin(1951), Kotter(1996), Willcocks et al (2005), Bryant(2006)	8 steps, Project Mgt methodologies
	LEAD- Resources and Stakeholders	Kotter and Schlesinger(1979), Shein(2004), Burnes(2004), Clarkson(2005), Yukl,(2002) Boyatzis and Akivou(2006), Longenecker and Rieman(2007)	Kotterand Schlesinger (1979) Resistance Mgt Approaches, Stakeholder management models
Integration	QUALITY- Monitor and Review	Cameron and Green(2005), Kotter(1996), Bamford and Forrester(2003)	8 steps
	CONSOLIDATE- Embed and Learn	Edwards(2005), Lewin(1951), Burnes(2004), Kotter(1996), Andrews et al(2008)	Lewin(1951) threee phase, 8 steps
Other	Further Change	Kotter(1996), Fronda and Moriceau(2008), Burnes(2004), Hayes(2007)	8 steps
	Culture	Kotter and Cohen(2002), Schein(2004), Yousef(2000), Willcocks et al (2005)	Kruger Iceberg
	Communication	Kotter(1996), Bryant(2006), Smith(2005)	8 steps
	Pace and Time	Carnall(2003), Rock and donde(2008), Walker et al(2007)	

The applicability of change management best practice to TCGT is discussed with reference to the 4 change stages identified in the conceptual model namely, Exploration, Planning, Action and Integration.

5.3.1 Change Stage – Exploration

The research shows that TGCT have considered external and internal drivers of change and used these to develop a compelling case for change. This has been communicated to and accepted by the Board who have approved significant funding for the project as a result. The case for change is understood to a large extent by employees, who indicate significant support for the systems changes in their questionnaire responses (Johnson & Scholes, 2007 and Pettigrew &Whipp,1991).

The case for change has been developed and communicated in an informal way with no specific accountability for the routine monitoring of change drivers and change related communication. The questionnaire findings show employees appreciate the communication activities undertaken to keep them informed.

The best practice components of the exploration stage of change management are applicable to TCGT as they are critical to developing an aligned understanding of the reasons why change is required throughout the organisation. (Kotter, 1996, Burnes, 2004)

5.3.2 Change Stage – Planning

The research shows that TCGT has experience of managing a significant planned change, in the form of a major organisational restructure, which was planned and managed by the CEO. The interview findings show that the organisation has not specifically considered the appropriate approach to change management relating to the IT project and that emergent change is not managed by any formal processes at present (Burnes, 2004).

No specific approach to employee engagement has been developed to support the change management aspects of the IT Systems Project but ad-hoc employee engagement has occurred (Bryant, 2006).

The questionnaire findings show that employees do support the IT Project but there is evidence of concern about the implications for job roles and ability to do the job with the new systems. Concerns need to be addressed to avoid resistance to change. The questionnaire findings do also indicate some dissatisfaction with the speed of progress and desire to understand the timetable for the phases of implementation (Parish et al, 2008).

At present there is no clear accountability or defined process for managing planned or emergent change in the organisation or the associated employee engagement required. The findings from the interviews indicate that the senior team think the organisation will find it difficult to adopt formal processes and comply with them (Kotter, 1996).

The research identifies that the best practice components of the planning stage of change namely, identifying the change approach, employee engagement and planning deliverables and resources are applicable to TCGT but implementation of a best practice approach is challenging given the experience and capability of resources (Burnes, 2002).

5.3.3 Change Stage – Action

The IT project is being managed using recognisable project management tools and disciplines and all suppliers are working in a formal project management environment. The project manager has been recruited externally to run the project as the organisation recognised the short fall in skill and experience (Willcocks et al, 2005).

The findings from the interviews show there is recognition of a short fall in expertise to manage and contribute to the project (Burnes, 2004).

Some interviewees expressed concern about the capability of current resources to contribute effectively to the project in relation to skills and experience gaps but the interviews and the questionnaire indicate more concern over resource availability (Burnes, 2004).

The interviews indicate that an agreed approach to stakeholder management has not been developed (Kotter, 1996).

The organisation is adopting the use of recognisable project management tools and disciplines to support the IT systems project and to facilitate effective working with suppliers. A suitable and agreed approach to resource planning, resource capability development and stakeholder management has not yet been identified (Willcocks et al, 2005 and Kotter & Schlesinger, 2008).

The research indicates that the best practice components of the action stage of change, namely management of process and deliverables, leadership and development of resources and managing stakeholders are applicable to TCGT but may prove challenging to implement due to resource capability and availability.

5.3.4 Change Stage – Integration

Referring to the conceptual model the integration stage is the stage which is focused on monitoring and reviewing the deliverables of change, embedding them into the organisation and learning from the experience of managing the process and using the new deliverables. The key areas of best practice relate to quality and consolidation, so that the benefits of change are realised (Cameron & Green, 2005 and Bamford & Forrester, 2003).

The findings from the interviews in respect of the integration stage, together with the views expressed about the organisational culture (non-compliance, lack of ownership for issue resolution) indicate that this stage of change may be the most challenging for TCGT to achieve (Andrews et al, 2008).

The best practice components in the integration stage are applicable to the organisation but the skills and experience available to devise and implement a suitable approach for the organisation are not currently in place.

5.3.5 Summary

The findings from the interviews and questionnaire and reference to the best practice components of change management, in each stage of change, indicate that the identified best practice is applicable to TCGT, thereby, achieving the second research aim.

Whilst the findings show progress towards and adoption of some aspects of best practice in the exploration stage and planning stage of change there are still capability gaps at present, these are further evident in the action stage and most noticeably in the integration stage of change.

Recommendations for the development of best practice will be made to satisfy the third and final research aim.

5.4 Recommendations

The third aim of the research is “To make recommendations for the development of best practice in The Charitable Giving Trust”.

This section sets out the recommendations which are based on the literature review, conceptual model and findings from the research.

The recommendations are structured around the 4 stages of change identified in the conceptual model namely exploration, planning, action and integration.

5.4.1 Change Stage - Exploration

Assign responsibility for continuous monitoring of external drivers of change for regular Executive Team review and action (Pettigrew & Whipp, 1991).

Agree responsibility for the development of a business improvement process to identify and manage internal drivers of change throughout the organisation (Walker et al, 2007).

The Executive Team create and maintain an aligned view of business goals and deliver appropriate communication to employees and other stakeholders (Kotter, 1996).

Build on the effective communications delivered to date by assigning responsibility for the development of a compelling case for change and keeping it under review so that the messages continue to be clear and contemporary (Kotter and Schlesinger, 2008).

5.4.2 Change Stage - Planning

Assign responsibility for the development and implementation of a change review approach for all identified change. The process would ensure that explicit decisions can be made to either, support the implementation of the change and assign suitable resources to achieve it or to reject proposed change for specific reasons, which can be communicated to stakeholders (Burnes, 2004).

Recognise the extent to which successful change relies on the engagement of employees (Bryant, 2006) and identify, recruit, empower and support resources to deliver required changes (Kotter, 1996).

Expect resistance to change due to the identified cultural issues (5.3.2) and proactively develop an approach to manage resistance and deal with uncertainty (Balogun and Hailey, 2008).

Create visibility of timescales and deliverables for the required changes and identify tasks to be completed which can be used to help employees and stakeholders understand the plan and participate in the change activities (Bryant, 2006).

5.4.3 Change Stage - Action

Build on the progress made with regard to the adoption of formal project management disciplines and utilise appropriate project management disciplines for all change initiatives (Willcocks et al, 2005).

Recruit project management expertise and develop current employees to create a significant uplift in organisational capability (Burnes, 2004).

Assign responsibility for a change capability review and development of an associated training plan for internal resources (Burnes, 2002).

Ensure internal resources allocated to change management tasks are adequately supported to develop the skills required (Burnes, 2002), giving priority to the enhancement of management capability and capacity (Stid & Bradach, 2009).

Conduct stakeholder management analysis and assign responsibilities appropriately for internal and external stakeholders to members of the Executive and project teams (Clarkson, 2005).

5.4.4 Change Stage – Integration

Develop an approach to the deliverables of change which reviews the deliverables prior to implementation to ensure business fit and operational readiness and post-implementation to ensure operational effectiveness (Cameron and Green, 2005).

Assign ownership for the acceptance and monitoring of changes post-implementation to ensure benefits are realised and compliance with agreed process is achieved (Andrews et al, 2008).

Develop a post implementation review process which is specifically for internal resources to learn from the experience of change and share learning with others (Longenecker et al, 2007).

5.4.5 Change – Other

Ensure that the ongoing requirement for change is understood by all employees and other stakeholders and a clear message that effective management of change is necessary for the organisation to succeed, is received and accepted by all (Kotter and Schlesinger, 2008).

5.5 Limitations of the Study

Limitations of the study arise from the research being conducted in one organisation. The research was designed to be executed in TCGT and has not considered other organisations in the charitable fund raising sector.

The data produced by the research was collected at a specific point in time and its relevance may diminish relatively quickly due to changes in TCGT, which are ongoing.

The researcher is an employee of TCGT and it is possible that she and the interviewees and respondents to the research may have been influenced by the working relationships in place.

The research questions for interviewees and respondents to the questionnaire were limited due to availability of time and resources to participate in the research. A greater number of questions and opportunities to follow up on points of interest identified would have increased the depth of the research.

The research produced some interesting comments from employees which if followed up and explored in greater depth may have proven beneficial for informing the recommendations. Due to the anonymity of respondents follow-up was not possible.

Focus groups were not used in this research as it was felt that some people would not put forward their views in such a setting. However the opportunity for multi-disciplinary discussion and airing of different views may have produced important insights which could have been beneficial to the recommendations.

5.6 Opportunities for Further Research

Opportunities for further research include supporting the achievement of recommendations made in respect of the development of employees and dealing with resistance to the introduction of formal processes namely:

Researching an approach and training strategy for the development of change capability in the employees of TCGT.

Developing an approach to support culture change and manage resistance, in relation to the introduction of formal processes and compliance.

Investigating the management capability gap in TCGT, in light of the work of Stid and Bradach (2009), which indicates significant management deficiencies in not for profit organisations.

Other opportunities relate to following up on the research conducted to review progress made in TCGT in respect of:

Reviewing progress in implementing the recommendations of this research

Reviewing the IT Systems Project in its post implementation phase to identify if change has been embedded and organisational learning has taken place.

Finally the identification of contemporary thinking on change management best practice could be applicable to other organisations and business sectors, therefore, there is an opportunity to conduct a case study, in another organisation in order to review applicability and make recommendations.

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List of Appendices

Question Numbers	Appendix 1 - Semi-Structured Interview	Change Stage	Conceptual Model Component	Literature	Model
1	From your perspective what are the key internal and external drivers for the Information Systems Project?	Exploration	Change Drivers / CONTEXT	Johnson et al, Pettigrew and Whipp, Ivancevich and Matteson, Walker et al,	PESTEL, Pettigrew and Whipp WHAT HOW WHERE,
2	What activities are undertaken at present to monitor the external environment and its impact on the organisation?				
3	What would you identify as the key business goals for the current financial year?		Leadership	Kotter, Hayes, Grundy, Yukl, Walker et al, Balogun and Hailey	Kotter 8 Steps Process,
4	How does the IS project fit in with those goals?				
5	What are the most significant benefits you expect will be achieved by the IS project?		Case for Change/WHY	Kotter, Burnes, Grundy	8 steps, Burnes Framework for Change
6	What do you think employees understand about the reasons for the IS project and what it will deliver?				
13	How is changed managed in the organisation at present?	Planning	Change Approach/HOW	Lewin, Kotter, Burnes, Pettigrew and Whipp, Pasmore and Fagans, Parish et al, Bryant	Lewin Three Phase , Framework for Change
7	What have employees already been told about the project?				
8	What are the routine communication processes for employees?		Engagement	Kotter, Burnes, Balogun and Hailey	8 steps, Framework for change
9	What do you think could be done to make employees positive and supportive about the changes to systems, processes and job roles brought about by the project?				
10	What do you think your role in engaging with employees should be througout the project?		Plan/WHAT	Lewin, Burnes, Pettigrew and Whipp, Kotter	Lewin Three Phase , Framework for Change, 8 steps
11	Do you anticipate resistance to the changes from staff and do you have evidence of resistance so far?				
12	What skills do you think are required to manage change effectively?	Action	MANAGE- Process and Deliverables	Lewin, Kotter, Willcocks et al, Bryant	8 steps, Project Mgt methodologies
14	What capability gaps have you identified within the organisation is respect of change management?				
15	What resources have been identified to participate in the project and why have they been selected?		LEAD- Resources and Stakeholders	Kotter and Schlesinger, Shein, Burnes, Clarkson, Yukl, Boyatzis and Akivou, Longenecker and Rieman	Kotter and Schlesinger Resistance Mgt Approaches
16	What is your level of confidence in the ability and availability of staff to contribute effectively to the project?				Stakeholder management models
17	Apart from staff what other key stakeholders have you identified who can have a positive or negative influence on the project or be impacted by the project?				
13	How is changed managed in the organisation at present?	Integration	QUALITY- Monitor and Review	Cameron and Green, Kotter, Bamford and Forrester	8 steps
13	How is changed managed in the organisation at present?		CONSOLIDATE- Embed and Learn	Szamosi and Duxbury, Edwards, Lewin, Burnes, Kotter, Andrews et al	Lewin threee phase, 8 steps
18	How does organisational learning managed at present?				
13	How is changed managed in the organisation at present?	All	Further Change	Kotter, Fronda and Moriceau, Burnes, Hayes	8 steps
19	What do you think the strengths and weaknesses of the organisational culture are at present?		Culture	Kotter and Cohen, Schein, Willcocks et al	
8	What are the routine communication processes for employees?		Communication	Kotter, Bryant, Smith	8 steps
20	What do you observe about the pace of change being experienced by organisations today and what does this mean for CT?		Pace and Time	Carnall, Rock and donde, Walker et al	

Questionnaire Question Numbers	Appendix 2 Questions	Change Stage	Conceptual Model Component	Literature	Model
1	What do you think the most important reasons for the Information Systems project are?	Exploration	Change Drivers / CONTEXT	Johnson et al, Pettigrew and Whipp, Ivancevich and Matteson, Walker et al,	PESTEL, Pettigrew and Whipp WHAT HOW WHERE,
2	How clearly have the reasons for the IT systems changes been explained to you by your manager or the executive team ?				
3	What is your opinion of the briefings and communications about the Information Systems project which you have attended / received to date?		Leadership	Kotter, Hayes, Yukl, Walker et al, Balogun and Hailey	Kotter 8 Steps Process,
4	Do you have any suggestions for improvements in communication about the IT project which you would welcome at this stage?				
5	To what extent do current systems issues negatively impact your ability to do your job at present?		Case for Change/WHY	Kotter, Burnes	8 steps, Burnes Framework for Change
6	How would you rate your job satisfaction at present?	Planning	Change Approach/HOW	Lewin, Kotter, Burnes, Pettigrew and Whipp, Pasmore and Fagans, Parish et al, Bryant	Lewin Three Phase , Framework for Change
7	What three systems improvements would most help you do your job better and improve your job satisfaction?				
			Engagement	Kotter, Burnes, Balogun and Hailey	8 steps, Framework for change
			Plan/WHAT	Lewin, Burnes, Pettigrew and Whipp, Kotter	Lewin Three Phase , Framework for Change, 8 steps
8	Which one of the following statements best describes your expectation of the Information Systems project?	Action	MANAGE- Process and Deliverables	Lewin, Kotter, Willcocks et al, Bryant	8 steps, Project Mgt methodologies
9	Which one of the following statements best describes how you would like to be involved in the IT project?		LEAD- Resources and Stakeholders	Kotter and Schlesinger, Shein, Burnes, Clarkson, Yukl, Boyatzis and Akivou, Longenecker and Rieman	Kotter and Schlesinger Resistance Mgt Approaches, Stakeholder management models
10	Overall how do you feel about the Information Systems Project?				
11	Do you have any comments or suggestions you would like to communicate to the project manager or the Executive Team about the Information Systems Project?				
		Integration	QUALITY- Monitor and Review	Cameron and Green, Kotter, Bamford and Forrester	8 steps
			CONSOLIDATE- Embed and Learn	Szamosi and Duxbury, Edwards, Lewin, Burnes, Kotter, Andrews et al	Lewin threee phase, 8 steps
		All	Further Change	Kotter, Fronda and Moriceau, Burnes, Hayes	8 steps
			Culture	Kotter and Cohen, Schein, Willcocks et al, Kruger	
			Communication	Kotter, Bryant, Smith	8 steps
			Pace and Time	Carnall, Rock and donde, Walker et al	

Appendix 3 - Semi-structured Interview Question Sheet		
Explanatory Notes: This interview is part of a research project I am undertaking to complete an MBA dissertation.My research project aims to identify applicable change management best practice for CT and make recommendations on how it could be deployed to support CT's technology driven change project. I would like to ask you 20 questions. You do not have to answer any question you do not wish to and you can end theinterview if you wish. All of the information you provide will be treated in complete confidence. It will be used solely to inform the analysis and recommendations arising from the research. I will take notes if that is acceptable to you.		**Interviewee Name:** **Interview Date:**
	Questions	**Responses**
1	**From your perspective what are the key internal and external drivers for the Information Systems Project?**	
2	**What activities are undertaken at present to monitor the external environment and its impact on the organisation?**	
3	**What would you identify as the key business goals for the current financial year?**	
4	**How does the IS project fit in with those goals?**	
5	**What are the most significant benefits you expect will be achieved by the IS project?**	
6	**What do you think employees understand about the reasons for the IS project and what it will deliver?**	
7	**What have employees already been told about the project?**	
8	**What are the routine communication processes for employees?**	

Appendix 3 - Semi-structured Interview Question Sheet		
		Interviewee Name: Interview Date:
	Questions	Responses
9	What do you think could be done to make employees positive and supportive about the changes to systems, processes and job roles brought about by the project?	
10	What do you think your role in engaging with employees should be througout the project?	
11	Do you anticipate resistance to the changes from staff and do you have evidence of resistance so far?	
12	What skills do you think are required to manage change effectively?	
13	How is changed managed in the organisation at present?	
14	What capability gaps have you identified within the organisation is respect of change management?	
15	What resources have been identified to participate in the project and why have they been selected?	
16	What is your level of confidence in the ability and availability of staff to contribute effectively to the project?	
17	Apart from staff what other key stakeholders have you identified who can have a positive or negative influence on the project or be impacted by the project?	
18	How is organisational learning managed at present?	
19	What do you think the strengths and weaknesses of the organisational culture are at present?	
20	What do you observe about the pace of change being experienced by organisations today and what does this mean for CT?	

Appendix 4 **Information Systems Questionnaire**

Colleagues – As part of my MBA studies I am undertaking research for a dissertation looking at information systems implementation and change management best practice

I would like to ask you for your assistance with my research by completing a short questionnaire.

The more responses I receive the more representative and reliable the information will be so I would be very grateful for your help.

One of the aims of my research is to make recommendations about the best way to manage the change brought about by the Information Systems Project I am currently managing here in CT.

I can assure you that all information you give me in this questionnaire will be treated with the strictest confidence and it will not be stored on CT servers or shared with anyone here.

It will only be used for analysis in order to inform my recommendations

I would like you to complete the questionnaire and place it in the envelope provided. You can then hand the envelope direct to me. I will take the envelopes off site and use the information supplied to complete my analysis. The questionnaires will then be shredded.

To provide further reassurance of confidentiality there is no opportunity to record your name on the questionnaire but I have asked that you indicate your department and length of service as this information will assist my analysis.

Please leave out any questions you do not wish to answer.

If you would like to ask me anything prior to completing the questionnaire please let me know.

The questionnaire should be returned by 4pm 14th October 2011.

Thank you very much for your assistance

Debby Williams

Question 1: What do you think are the most important reasons for undertaking the Information Systems Project?

Please identify up to 3:

1

2

3

Question 2: How clearly have the reasons for the project been communicated to you by your manager or the Executive Team?

Please indicate your opinion by circling one of the following numbers:

10	**9**	**8**	**7**	**6**	**5**	**4**	**3**	**2**	**1**
Extremely clear									**Very Unclear**

If you have any comments please add below :

Question 3: What is your opinion of the briefings and communications about the project that you have attended/received to date?

Please indicate your opinion by circling one of the following numbers:

10	**9**	**8**	**7**	**6**	**5**	**4**	**3**	**2**	**1**
Excellent									**Poor**

If you have any comments please add below :

Question 4: Do you have any suggestions for improvements in communication about the project which you would welcome at this stage?

Please indicate up to 3:

1

2

3

continued overleaf

Question 5: To what extent do current systems issues negatively impact your ability to do your job at present?

Please indicate your opinion by circling one of the following numbers:

10	**9**	**8**	**7**	**6**	**5**	**4**	**3**	**2**	**1**
Significantly									**Minimally**

If you have any comments please add below :

Question 6: How would you rate your job satisfaction at present?

Please indicate your opinion by circling one of the following numbers:

10	**9**	**8**	**7**	**6**	**5**	**4**	**3**	**2**	**1**
Highly Satisfied								**Very Unsatisfied**	

If you have any comments please add below :

Question 7: What systems improvements would most help you to do your job better and improve your job satisfaction?

Please indicate up to 3:

1

2

3

Question 8: Which one of the following statements best describes your expectation of how the IT project could impact you and your ability to do your job?

Please circle the number of the statement that is the closest to your view.

1. The project will ensure I have the systems support to do my job effectively
2. I will gain new knowledge and skills to improve my career prospects
3. It will make no difference to me
4. I am concerned that it may reduce my ability to do my job well

continued overleaf

Question 9: Which one of the following statements best describes how you would like to be involved in the IT project?

Please circle the number of the statement which is closest to your view

1 I would like the opportunity to undertake a specific role in the project
2 I am willing to undertake tasks to support the project
3 I would like to support the project but I have no capacity due to workload
4 I do not wish to be involved in the project

Question 10: How do you feel about the forthcoming systems changes?

Please indicate your opinion by circling one of the following numbers:

10	9	8	7	6	5	4	3	2	1
Very Positive									**Very Concerned**

If you have any comments please add below :

Question 11: Are there any comments you would like to communicate to the IT Project Manager or the Executive Team with regard to the IT Project?

Please feedback up to 3 comments:

1

2

3

continued overleaf

Question 12: **Please indicate by circling the correct options below, your length of service with CT and the team you work in.**

Length of service: less than 2 years 2 to 5 years 6 to 10 years Over 10 years

Team: Finance Operations Commercial Other/Volunteer

Question 13: Do you have any further comments you wish to make?

1

2

3

Thank you for completing this questionnaire.

Please place it in the envelope supplied and hand directly to Debby Williams by 4 p.m. Friday 14th October